

Culture Assessment Overview



General Overview

The Pontefract Group (TPG) provides consultative guidance through the assessment of an organization's current culture and operating practices to help clients define and implement a new "future of work" model.

The Culture Assessment focuses on the following elements:

- **Leadership Practices:** analysis of current leadership behaviours across the organization;
- **Learning & Performance Practices:** a review of learning systems and methods of performance;
- **Collaboration Practices:** an investigation into existing collaborative techniques and behaviours at the organization (for both leaders/employees), including the use of digital technologies;
- **Work Practices:** a study of present policies, procedures (including any existing leadership habits) concerning work environment design possibilities and overall flexible work considerations;
- **Client Experience Practices:** an exploration of the organization's client experience & client centricity processes, behaviours and norms.

What is the Assessment?

- **Kick-off Meeting** (2 hours) with various stakeholders invited by the client to outline the purpose of the Culture Assessment
- **Individual 1-1 interviews and small focus groups** with key stakeholders to assess current practices and desired future state, to determine the best strategy and prioritization for organizational change.
 - TPG recommends a cross-section of employees and leaders to be formally interviewed.
 - The total number of sessions dedicated to interviewing (whether 1-1 interviews or focus groups) does not exceed twenty-five (25).
 - **NOTE:** Before the interview process begins, the organization provides TPG with a list of people and groups from various units to interview. A proposed list of roles and functions will be forwarded to the organization by TPG to ensure alignment and better organizational representation needs during the interview process before any work begins.
 - Interviews will be conducted over the phone or using Zoom. (T&E expenses can be saved unless the client explicitly requests onsite visits/interviews, but not all interviews or focus groups will be conducted face-to-face.)
 - It is advantageous for the client to submit employee engagement data and results, in addition to any other qualitative or quantitative data that can help the Culture Assessment.
- **Surveying** of a significant subset of the organization's employee population using an online survey tool supplied and administered by TPG to assess broader employee sentiment, to address all aspects of the Culture Assessment agreed to by the client.
 - **NOTE:** Before administering the survey, TPG will work with the client to define the scope and sample size of the target audience. The final target audience should represent an accurate cross-section of the organization including employee roles and tenure.
 - **The survey** is optional and does not necessarily need to be administered, but is recommended. Some clients prefer to use existing employee engagement survey data while others indicate there is survey fatigue.

What are the Outcomes and Deliverables?

- **Report:** TPG will produce a report titled “Assessment Results” that contains the following:
 - Current State Analysis – a detailed breakdown of the organization’s current state;
 - Potential Future State Recommendation - foundational requirements and recommendations for the organization to make changes in its various practices;
 - Transition Plan - key recommended and prioritized actions to help the organization shift from the current state to future state. It includes short-term wins and long-term initiatives.
- **Strategy Presentation:** an executive summary presentation of all findings and recommendations.
- **Summary Review:** Onsite review to discuss the findings & recommendations with key executives.

What is the scope of the engagement?

- Dependent on the number of interviews and focus groups as well as the complexity of the organization, the assessment engagement can range between 200 and 250 hours of work.

How much does it cost?

- One-time fee of \$75,000 + GST. Travel related expenditures to be invoiced at cost.

Who is The Pontefract Group?

Dan Pontefract is the founder and CEO of The Pontefract Group, a firm that improves the state of leadership and organizational culture. The group comprises of senior organizational design professionals who have worked in a multitude of public sector, for-profit and not-for-profit organizations assisting leaders and executives with their specific needs.

After twenty-five years in senior leadership roles across organizations such as TELUS, SAP and BCIT, Dan launched The Pontefract Group to help leaders and organizations improve levels of engagement, productivity, culture and processes. The Pontefract Group conducts organization-wide assessments, organizational redesign, consulting, coaching, workshop facilitation as well as keynote speaking.

Dan is the best-selling author of three books: *OPEN TO THINK*, *THE PURPOSE EFFECT* and *FLAT ARMY*. He is at work on his fourth book, *MORE THAN LEADERSHIP*, set to publish in the fall of 2020. Dan is also an adjunct professor at the University of Victoria, Gustavson School of Business and has garnered more than 20 industry awards over his career.

Previously over a ten-year period as Chief Envisioner and Chief Learning Officer at TELUS—a Canadian telecommunications company with revenues of \$14 billion and 50,000 global employees—Dan launched the Transformation Office, the TELUS MBA, and the TELUS Leadership Philosophy, all award-winning initiatives that dramatically helped to increase the company’s employee engagement to record levels of nearly 90%.

