

Leadership Culture Assessment & Policy Development

Changes in leadership and the natural evolution of our social and professional cultures are reflected in the changing culture of your organization. Quantum Governance focuses its work on the Board and C-suite because we know that these leaders set the tone for the culture of the entire organization. In the 2020 State of Credit Union Governance Report authored by Quantum Governance, the David & Sharon Johnston Centre and CUES, *COVID-19 and DEI: Revolution & Evolution Come to the Credit Union Community*, it was revealed that effective cultural initiatives require active, enduring structures and processes. More than just a well-articulated, public-facing policy statement, these cultural initiatives must indeed be embedded in the very DNA of the organization.

An initial first step toward changing the culture of your organization is to understand what it is currently.

Quantum Governance's contemporary assessment tool has been designed to spotlight the values and principles that define your organization, identify gaps and gather data on the perspectives that will shape your organization's culture in the future. Collecting information about your organization is an important part of understanding your current culture and formulating a plan for shaping it to achieve your future goals.

Online Survey

Our proprietary online survey is designed to probe areas such as:

- Your organization's DEI vision and alignment
- Board and management
- People and operations
- Culture and public-facing opportunities

The final section requests some demographic information and we encourage participants, through the inclusion of narrative questions, to provide additional commentary to expound on their responses as needed.

The Quantum Governance team manages all aspects of survey distribution and data gathering for a turnkey experience for your board and senior leadership. The survey will be customized to your organization whether you are a credit union, nonprofit organization, foundation, association or corporation.

Document Review, Interviews & Assessment Report

Results from this anonymous, online assessment tool, in addition to a document review and interviews with select members of each Board and leadership team lay the foundation for an Cultural Assessment Report. The report will focus on findings and recommendations that will seed content and strategic conversations for a series of virtual retreat sessions.

Virtual Retreats

The Quantum Governance team will pinpoint areas of alignment, help to identify focused areas of growth, develop a common and agreed upon language and understanding of the culture you wish to establish as a construct of your organization's governance and devise an action plan for the pursuit of excellence over the course of four engaging 2-hour virtual retreat sessions.

Follow Through

Quantum Governance will provide 30-, 60- and 90-day check-ins to ensure the seamless union of cultural policies and practices

Engagement Methodology

Every Quantum Governance engagement is customized for – and in collaboration with – our clients. As such, the final methodology will be decided upon in conjunction with your organization's leadership (CEO, Board Chair and Governance Committee Chair).