



# Journey to Assessment Excellence



*Based on the Assessor's Maturity Curve*

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# CORE CONCEPTS

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*This section describes 5 ideas that we believe are absolutely essential to sustain you and your organization in your journey to achieve excellence.*



**Google** Defines an Organization as...  
an organized body of people with a particular purpose,  
especially a business, society, association, etc.



Defines Health as...  
a state of well-being that directly  
results when the design of something  
aligns with its intended purpose.

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# CORE CONCEPT #1

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## Define the Big Picture

A state of **collective well-being** that  
directly results by **creating a culture**  
which allow an organized body of people  
to **wholeheartedly pursue a shared**  
**purpose.**



Defines *Culture* as...

The customary beliefs, social forms, and material traits of a racial, religious, or social group



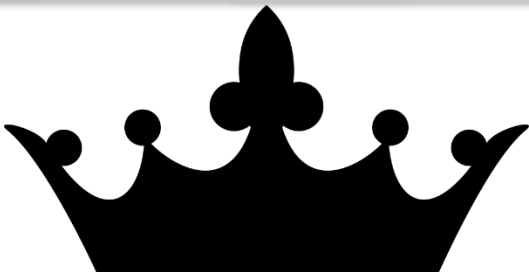
Defines *Culture* as...

The unspoken but dominant modes of thinking, doing, and behaving that permeate an organization.

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## CORE CONCEPT #2

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### **Culture is King**

An organization can never reach its maximum potential without intentionally nurturing an enduring culture of trust shaped by shared purpose.



According to Patrick Lencioni, Organizational Health expert, if you took a poll, most people would define trust as the reliability or predictability of another's behavior or performance.



Defines Trust as...  
Genuine interpersonal transparency with others without concern or second thoughts about how other team members' will view one's personal or professional adequacy.

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## CORE CONCEPT #3

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### Trust is a Must

What Lencioni calls *Vulnerability-Based Trust* leads to openness, acknowledging struggles with team members, and harnessing the collective strength of the team.



NATIONAL  
GEOGRAPHIC

Defines the *North Star* as...

a standard waypoint used by navigators for centuries because its position in the sky [is] fixed.



Defines *Purpose* as...

The North Star that guides your journey to assessing excellence. By creating a shared purpose, you locate where you want to go, which helps define how you will get there.

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## CORE CONCEPT #4

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### **Know your Why**

When each person in your office or organization understands and has committed to your core purpose, you create clarity as to goals, roles, and key outcomes for success.



It is common to see the goal of workplace wellness as primarily implementing programs for improving physical and mental health.



We see workplace wellness more holistically by focusing on three big ideas: Learned Optimism, Self-Social Awareness, and Reflective Thinking. These lead to resiliency.

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## CORE CONCEPT #5

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### **Resilience is the Gold Standard**

The hallmark of Stage 4 organizations is they are resilient: The meta-competency of organizational health and a key differentiator of workplaces where wellness has become a robust part of the culture and systems.

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# Breakout Session Questions

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# Assessors Maturity Curve Workshop

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## ***Breakout Session #1:***

*Why can it be difficult for a team or organization to take the first step, and “stop digging”?*

## ***Breakout Session #2***

*Who is the most influential person in your life?*

## ***Breakout Session #3***

*Who are the two people you trust most in the world?*

*Who are the two people “Work Friends” you trust most in the world?*

## ***Breakout Session #4***

*What kinds of disruptive innovation might you anticipate in the field of assessing in the next five to ten years?*

## ***Breakout Session #5***

*Map your Journey*

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# Note Pages

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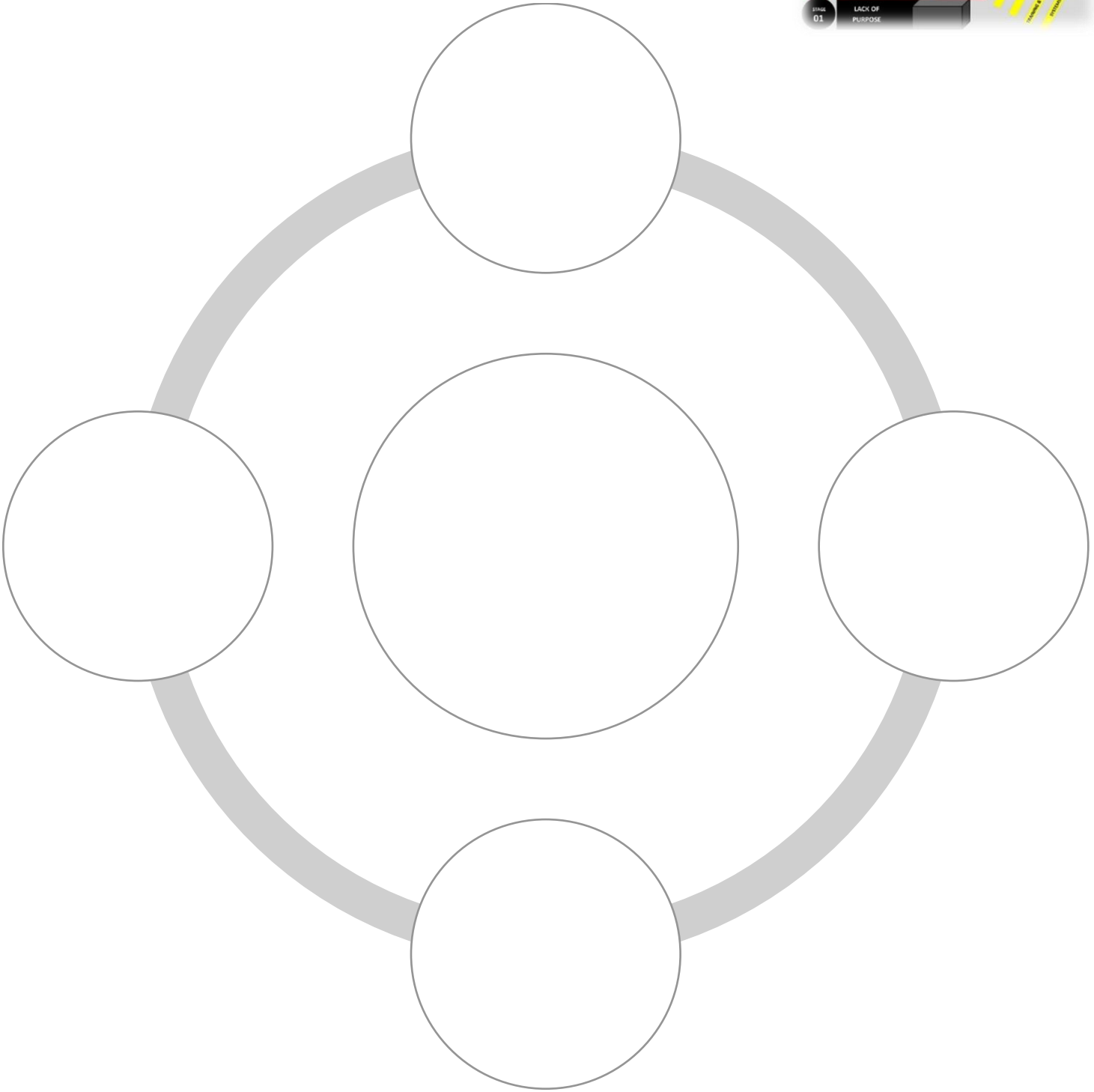
# Activities

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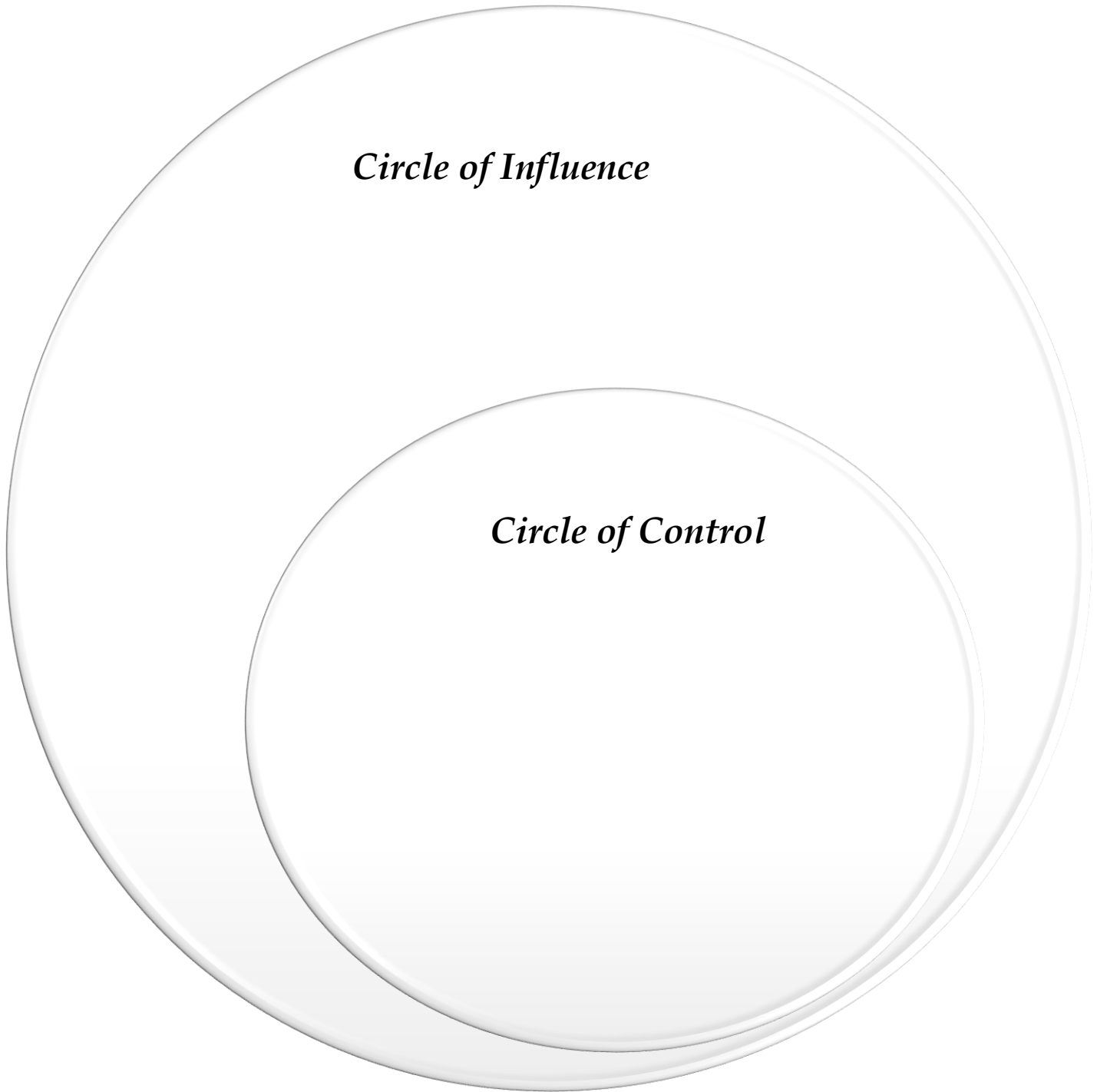


# Participant Activity: Word Association

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# Participant Activity: Spheres of Influence

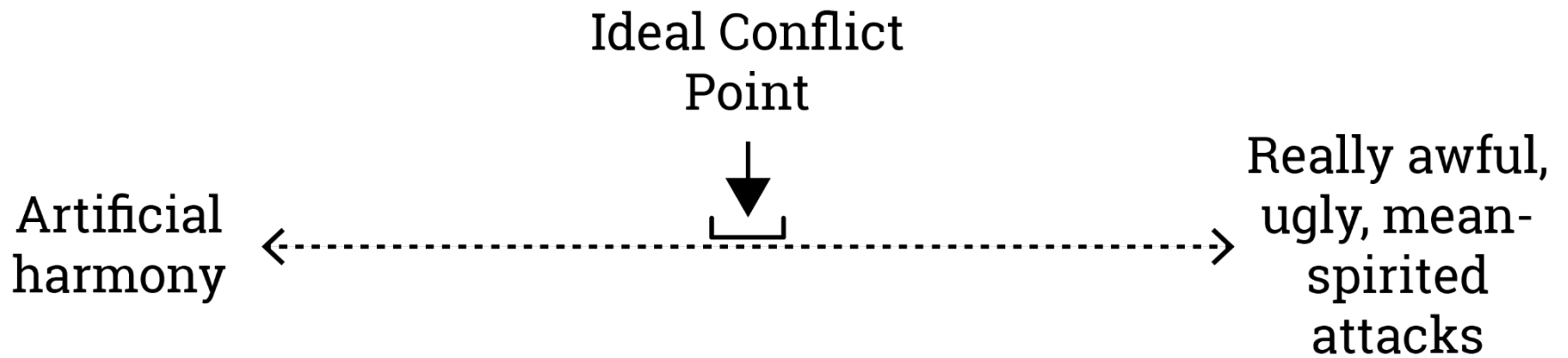




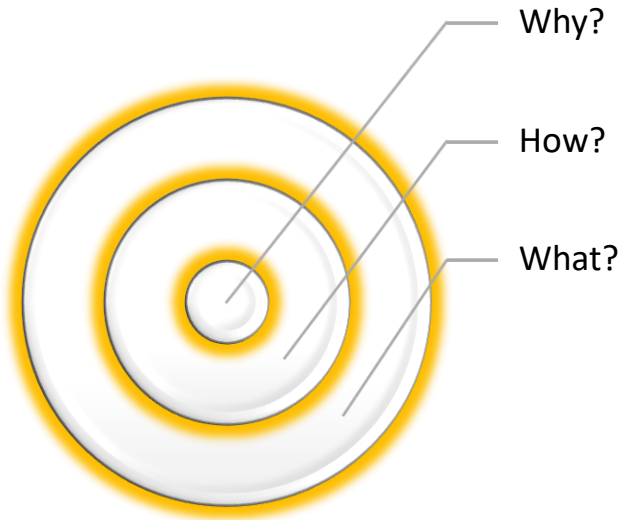


# CONFLICT CONTINUUM

Place an X where you think the team falls on the continuum



# Participant Activity: The Golden Circle



## **DEFINE YOUR WHY**

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*Very few people or companies can clearly articulate WHY they do what they do.*

*By WHY I mean what is your purpose, cause or belief?*

*WHY does your company exist?*

*WHY do you get out of bed every morning?*

*And WHY should anyone care?*

— Simon Sinek

***Start with Why: How Great Leaders Inspire Everyone to Take Action***



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# Additional Resources

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# Assessor's Maturity Curve Rubric

<b>Stage 4 - Innovative Anticipation</b>		
<i>Climate &amp; Culture</i>	<i>Systems &amp; Processes</i>	<i>Professional Growth</i>
<p>High-levels of genuine trust pervade throughout the organization priming risk-taking and a mind-set conducive to creating innovation. The overall work of the office is carried out with superior excellence because each employee understands how their role serves the greater purpose of the organization's mission.</p>	<p>Both within and across departments, structures seamlessly streamline and coordinate all essential functions (i.e. personnel management, fiscal operations, workflow, and public relations). Systems and processes not only produce consistent excellence in the execution of all responsibilities and performance expectations across the entire organization but allow for the organization to be a leader on the forefront of emerging innovations that will define best practices for the industry.</p>	<p>A culture of continuous learning has fully taken root in which employees concertedlly pursue professional learning leading to high-levels of expertise, not primarily for the tangible benefits such expertise is expected to provide (e.g. higher pay or elevated status), but out of a true sense of curiosity. This passion for professional growth perpetuates, not only an increasing number of highly-trained employees, but a collective expertise that provides skills and the intellectual clout that nurtures innovation. Knowledge transfer occurs systematically and seamlessly.</p>
<b>Stage 3 - Habits of Excellence</b>		
<i>Climate &amp; Culture</i>	<i>Systems &amp; Processes</i>	<i>Professional Growth</i>
<p>Trust has become highly valued and operationalized on a consistent basis, especially within departments with some overflow to other departments at times. Genuine collaboration and clarity of purpose has become enculturated leading to consistently excellent results and a sense of collective pride.</p>	<p>Both within and across departments, structures streamline and coordinate all essential functions (i.e. personnel management, fiscal operations, workflow, and public relations). This results in systems and processes that lead to high levels of collaboration within and across all departments, consistently accurate assessed values, adherence to all statutory guidelines without exception, reduced appeals and legal exposure, successful litigation outcomes, greater levels of respect with key stakeholders (e.g. taxpayers, business groups, etc.), and low employee turnover.</p>	<p>A culture of continuous learning is increasingly evident in which employees actively seek to not only deepen their current skill sets but to expand their competence into areas of professional knowledge previously unexplored. Expectations are clearly communicated to employees for setting annual goals for professional growth which are pursued with enthusiasm by all. Cross-training occurs routinely, helping to ensure transfer of institutional knowledge across departments and roles.</p>

# Assessor's Maturity Curve Rubric

Stage 2 - Potential for Excellence		
<i>Climate &amp; Culture</i>	<i>Systems &amp; Processes</i>	<i>Professional Growth</i>
<p>Siloing still apparent between departments but a greater willingness to collaborate begins to emerge, albeit in a haphazard fashion. Developing higher levels of trust is recognized as important but levels of trust among and within departments ebb &amp; flow.</p>	<p>Structures, both within and across departments, to coordinate essential functions (i.e. personnel management, fiscal operations, workflow, public relations) are emerging but not fully operationalized. Systems and processes have been established leading to improved but still inconsistent collaboration and communication within and between departments and an increasing congruence between data collection and assessed valuations.</p>	<p>All employees are adequately trained for their given roles and increasingly performance expectations are at least discussed and sometimes implemented. As a result, employees increasingly understand what they need to do and how they can improve their skill sets related to these performance expectations. Some employees pursue professional learning beyond what is required in their current roles and at times they share what they learn with colleagues.</p>
Stage 1 - Lack of Purpose		
<i>Climate &amp; Culture</i>	<i>Systems &amp; Processes</i>	<i>Professional Growth</i>
<p>Low or no true levels of trust exist and this permeates the entire organization. This results in an "every person for themselves" culture marked by a lack of clear purpose with employees working in isolation. Compliance to minimum standards is typically the highest goal (which is only sporadically attained).</p>	<p>Structures, both within and across departments, to coordinate essential functions (i.e. personnel management, fiscal operations, workflow, public relations) are either non-existent or outdated. This leads to patchwork results where only what is legally mandated in terms of statutory or regulatory standards are met (but with difficulty), pervasively ineffective communication, and systems and processes that are frequently outmoded or, at best, conform to only minimum expectations.</p>	<p>A "This is the way we have always done it" mentality pervades the organization resulting in little motivation for employees to pursue professional growth. Few if any expectations are communicated to employees for continued learning or performance expectations which is reflected in the fact that, typically, the professional growth that does occur is only to ensure compliance with standards required for re-certification.</p>

# Assessors Maturity Curve Scorecard



Evaluate each domain of your organization's health (i.e. Climate & Culture, Systems & Processes, and Professional Growth) using this scorecard and the *Assessors Maturity Curve Rubric*.

## Domain 1: Climate & Culture

	Stage
<i>Where are we (currently)?</i>	
<i>Where do we want to go (next)?</i>	

How will we get there?

Identify 1 or 2 goals that you could implement in the next 3-4 months.

### Goal 1

Identify a key action step to move towards this goal

### Goal 2 (if needed)

Identify a key action step to move towards this goal

## Domain 2: Systems & Processes

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Stage	
<i>Where are We (currently)?</i>	
<i>Where do we want to go (next)?</i>	

How will we get there?

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Identify 1 or 2 goals that you could implement in the next 3-4 months.

**Goal 1**

**Goal 2 (if needed)**

Identify a key action step to move towards this goal

Identify a key action step to move towards this goal

## Domain 3: Professional Growth

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	Stage
<i>Where are We (currently)?</i>	
<i>Where do we want to go (next)?</i>	

How will we get there?

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Identify 1 or 2 goals that you could implement in the next 3-4 months.

**Goal 1**

**Goal 2 (if needed)**

Identify a key action step to move towards this goal

Identify a key action step to move towards this goal



Additional Trainings are available to aid you in your journey to assessing excellence and creating an organization that thrives not just survives.

We are here for you!



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