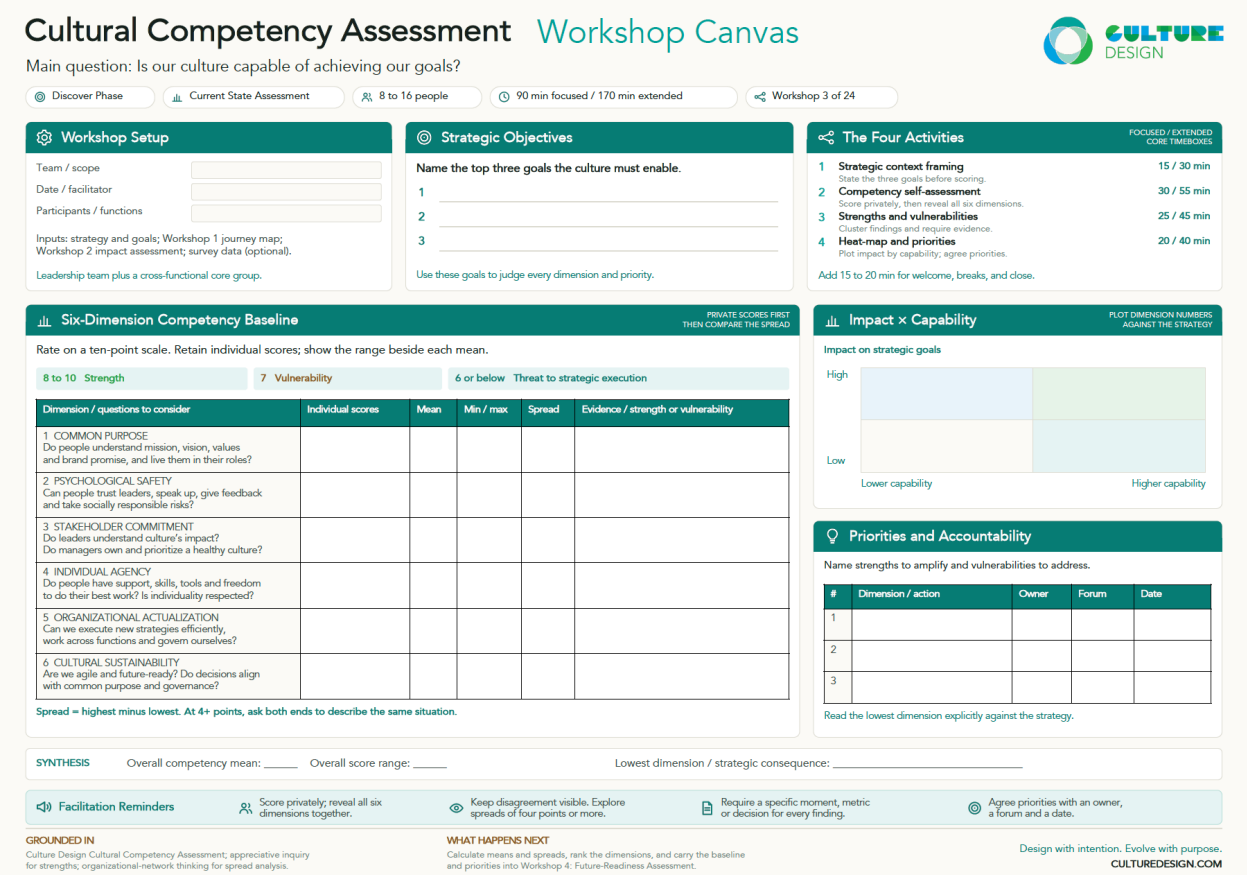
Cultural Competency Assessment

Workshop Wednesday 10.7.26 | Authored by Jason Burnham



Cultural Competency Assessment Workshop Canvas

Main question: Is our culture capable of achieving our goals?

Discover Phase | Current State Assessment | 8 to 16 people | 90 min focused / 170 min extended | Workshop 3 of 24

Workshop Setup

Team / scope

Date / facilitator

Participants / functions

Inputs: strategy and goals; Workshop 1 journey map; Workshop 2 impact assessment; survey data (optional).

Leadership team plus a cross-functional core group.

Strategic Objectives

Name the top three goals the culture must enable.

1

2

3

Use these goals to judge every dimension and priority.

The Four Activities

FOCUSED / EXTENDED CORE TIMEBOXES

1 **Strategic context framing** — State the three goals before scoring. — 15 / 30 min

2 **Competency self-assessment** — Score privately, then reveal all six dimensions. — 30 / 55 min

3 **Strengths and vulnerabilities** — Cluster findings and require evidence. — 25 / 45 min

4 **Heat-map and priorities** — Plot impact by capability; agree priorities. — 20 / 40 min

Add 15 to 20 min for welcome, breaks, and close.

Six-Dimension Competency Baseline

PRIVATE SCORES FIRST THEN COMPARE THE SPREAD

Rate on a ten-point scale. Retain individual scores; show the range beside each mean.

8 to 10 Strength | 7 Vulnerability | 6 or below Threat to strategic execution

Dimension / questions to consider	Individual scores	Mean	Min / max	Spread	Evidence / strength or vulnerability
1 COMMON PURPOSE Do people understand mission, vision, values and brand promise, and live them in their roles?					
2 PSYCHOLOGICAL SAFETY Can people trust leaders, speak up, give feedback and take socially responsible risks?					
3 STAKEHOLDER COMMITMENT Do leaders understand culture's impact? Do managers own and prioritize a healthy culture?					
4 INDIVIDUAL AGENCY Do people have support, skills, tools and freedom to do their best work? Is individuality respected?					
5 ORGANIZATIONAL ACTUALIZATION Can we execute new strategies efficiently, work across functions and govern ourselves?					
6 CULTURAL SUSTAINABILITY Are we agile and future-ready? Do decisions align with common purpose and governance?					

Spread = highest minus lowest. At 4+ points, ask both ends to describe the same situation.

Impact × Capability

PLOT DIMENSION NUMBERS AGAINST THE STRATEGY

Impact on strategic goals

High / Low

Lower capability — Higher capability

Priorities and Accountability

Name strengths to amplify and vulnerabilities to address.

#	Dimension / action	Owner	Forum	Date
1				
2				
3				

Read the lowest dimension explicitly against the strategy.

SYNTHESIS Overall competency mean: _____ Overall score range: _____ Lowest dimension / strategic consequence: _____

Facilitation Reminders: Score privately; reveal all six dimensions together. | Keep disagreement visible. Explore spreads of four points or more. | Require a specific moment, metric or decision for every finding. | Agree priorities with an owner, a forum and a date.

GROUNDED IN: Culture Design Cultural Competency Assessment; appreciative inquiry for strengths; organizational-network thinking for spread analysis.

WHAT HAPPENS NEXT: Calculate means and spreads, rank the dimensions, and carry the baseline and priorities into Workshop 4: Future-Readiness Assessment.

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Your culture determines what your organization can accomplish together. We can set ambitious goals, but achieving them depends on how people work, make decisions, and respond when priorities compete. The Cultural Competency Assessment helps your leadership team assess whether those capabilities support the strategy you have committed to. It is the third workshop in the Discover phase of the Culture Design series. Using our cultural competency model and the workshop method we have refined across client engagements, participants assess six dimensions of culture, identify strengths they can build on, and examine the vulnerabilities that could prevent them from achieving their goals.

Main question: Is our culture capable of achieving our goals?

Phase: Discover - What is our current experience?

Best for: A leadership team plus a cross-functional core group, eight to sixteen (8 to 16) people.

Format: A focused session of roughly ninety minutes or an extended half-day session, using the activity timeboxes below.

Inputs: Business strategy and goals; outputs of Workshops 1 and 2; engagement or culture survey data, optional.

Outputs: A cultural competency baseline and a prioritized map of strengths and vulnerabilities. A worked example and completed canvas appear near the end of this article.

Description

Cultural competency is our collective ability to relate, align, communicate, collaborate, co-create, and act. It affects how well we can execute a strategy, especially when people are under pressure or working across functions. This workshop provides a baseline of that capability. Participants assess the organization individually, then compare their scores and discuss the experiences behind them. Pay particular attention to the differences. An average can conceal very different experiences of the same organization, and discussing those differences helps explain what a survey score alone cannot.

Purpose & Objectives

Culture varies across locations, functions, and teams. The norms leaders establish help shape those differences, which can affect whether people are able to deliver on a shared strategy. This workshop makes that variation visible so you can assess where your culture supports execution and where it gets in the way. Use the objectives below to guide each activity.

- Anchor the work in the strategy and the goals the culture must enable.
- Rate the organization across the six cultural competency dimensions.
- Identify the cultural strengths to amplify and the vulnerabilities to address.
- Produce a shared view of where culture helps or hinders execution.

Cultural Competency Dimensions

The workshop uses the same six dimensions as the Cultural Maturity Assessment, allowing you to compare workshop findings with survey results. Use the questions under each dimension to guide the assessment and the discussion that follows.

COMMON PURPOSE: Do employees and partners understand the mission, vision, values, and brand promise? Do they know how to bring those to life within their own roles and functions?

PSYCHOLOGICAL SAFETY: How trusted are leaders and managers, and can people express themselves and give feedback without fear of consequences? How safe do teams feel taking socially responsible risks?

STAKEHOLDER COMMITMENT: Does leadership understand culture and its impact on business performance? Do managers understand their own role in creating a healthy culture, and do they prioritize it?

INDIVIDUAL AGENCY: Do managers inspire, empower, and support their teams with the skills, knowledge, tools, and freedom to do their best work? Is individuality respected?

ORGANIZATIONAL ACTUALIZATION: How capable and efficient is the organization at executing new strategies? Do functions act as one cohesive team, and how self-governing are they?

CULTURAL SUSTAINABILITY: Is the organization agile and future-ready? Do strategic decisions and operational changes align with the common purpose and the governance model?

Agenda & Activities

Activity 1: Strategic Context Framing [15-30 minutes] Review the strategy and the goals your culture needs to support. Keep the main question visible throughout the workshop. Before anyone starts scoring, make sure participants can state the top three strategic objectives.

Activity 2: Competency Self-Assessment [30-45 minutes] Ask participants to score each dimension privately on a ten-point scale. Reveal all scores together, then discuss where they differ and why.

Activity 3: Strengths & Vulnerabilities [25-45 minutes] Use the scores to identify strengths to amplify and vulnerabilities to address. Ask participants to provide evidence for each finding.

Activity 4: Heat-Map & Priorities [20-40 minutes] Plot the dimensions on an impact by capability grid and agree which priorities to carry into the Design phase.

Total Core Time: ~90-170 minutes. Add 15-20 minutes for welcome, breaks, and close.

Where It Sits in the Process

Workshop 3 of 24 builds on the evidence gathered during Discover. Workshop 1 maps the stakeholder journey, and Workshop 2 assesses the impact of those experiences. Participants bring that work into this session to examine the cultural capabilities behind what stakeholders experience. The baseline then feeds Workshop 4, the Future-Readiness Assessment, where you assess whether

people are equipped to address the gaps. Keep that sequence intact. Without the journey map, impact evidence, and strategy in front of them, participants have less to base their scores on beyond their own impressions.

Facilitator Instructions

Ask everyone to score privately before opening the discussion. Once a senior leader shares a score, others may adjust their answers toward it, and you lose the differences you need to understand. Use the same ten-point scale and scoring legend across sessions and when comparing workshop findings with survey data. In our audits, workshops, and reports, eight to ten is a strength, seven is a vulnerability, and six or below is a threat to strategic execution.

Reveal all six dimensions together so participants can see the full assessment before discussing individual scores. When scores for a dimension differ by four points or more, ask people at both ends to describe the same situation. Give them time to explain what they experienced and how it informed their score. Understand the disagreement before trying to resolve it. These differences can help explain how culture varies across the organization.

Ask for evidence behind every strength and vulnerability. A specific moment, metric, or decision gives the group something to examine. If someone offers a general impression, help them identify the experience behind it. Stay consistent with this throughout the session so the findings give your leadership team a clear basis for action.

Synthesis

After the session, calculate the mean for each dimension and the overall competency score, and record the spread alongside each. A dimension with a mean of 7.4 and a two-point spread needs a different discussion from one with the same mean and a six-point spread. Keep both visible in the synthesis.

Rank the dimensions and examine the lowest score against the strategy. In a recent audit we conducted, a research organization scored 7.1 overall and 6.5 on Organizational Actualization, its lowest dimension. Its newly published strategy depended on integrating work across silos. That relationship was central to the assessment. The organization needed to strengthen the very capability its strategy depended on, and the rest of the report provided the evidence behind that finding.

Assign each priority an owner, a forum where it will be reviewed, and a date before you circulate the synthesis. This connects the assessment to the decisions and resources needed to address it.

Bring the prioritized map into the Future-Readiness Assessment, where the team will identify the capability gaps and who is responsible for addressing them.

What the Output Looks Like: A Worked Example

The example below shows how the workshop activities come together in a completed canvas. Kestrel Valley Health is a fictional regional health network of roughly 2,400 people that has acquired three independent clinic groups. All scores, findings, and decisions are illustrative and do not come from a client engagement. In this scenario, twelve leaders take part in the focused ninety-minute session. Six are executives, three run clinics, and three lead operations and patient experience.

Activity 1 Outcome: Three Goals On the Wall - Participants agree on the three goals their culture needs to support over the next eighteen months. They keep these visible throughout the session so the assessment stays connected to the strategy.

- Fold the three acquired clinic groups into one operating model by the fourth quarter.
- Move twenty percent (20%) of primary-care visits to virtual care within eighteen months.
- Cut the time to a first appointment from nineteen days to seven.

Activity 2 Outcome: The Baseline - All twelve participants score privately before the facilitator shares the results for all six dimensions together.

Dimension	Mean	Min / Max	Spread	Reading
Common Purpose	8.1	7 / 9	2	Strength
Psychological Safety	6.4	4 / 9	**5**	Threat
Stakeholder Commitment	7.1	6 / 8	2	Vulnerability
Individual Agency	7.7	7 / 8	1	Vulnerability
Organizational Actualization	**5.7**	4 / 7	3	Threat
Cultural Sustainability	7.2	6 / 8	2	Vulnerability

The overall mean is 7.0, with dimension means ranging from 5.7 to 8.1. For decimal scores, a mean from 7.0 to 7.9 is a vulnerability, and anything below 7.0 is a threat. The six executives score Psychological Safety between seven and nine. The three clinic directors and three operations leads score it between four and six. The facilitator asks the chief nursing officer and a clinic director to describe the same near-miss review from the previous quarter. Their accounts differ on almost everything except the date.

Activity 3 Outcome: Strengths & Vulnerabilities with Evidence - Each finding refers to a specific moment, system, or document. Participants offer “Morale is low at the new clinics” twice. Each

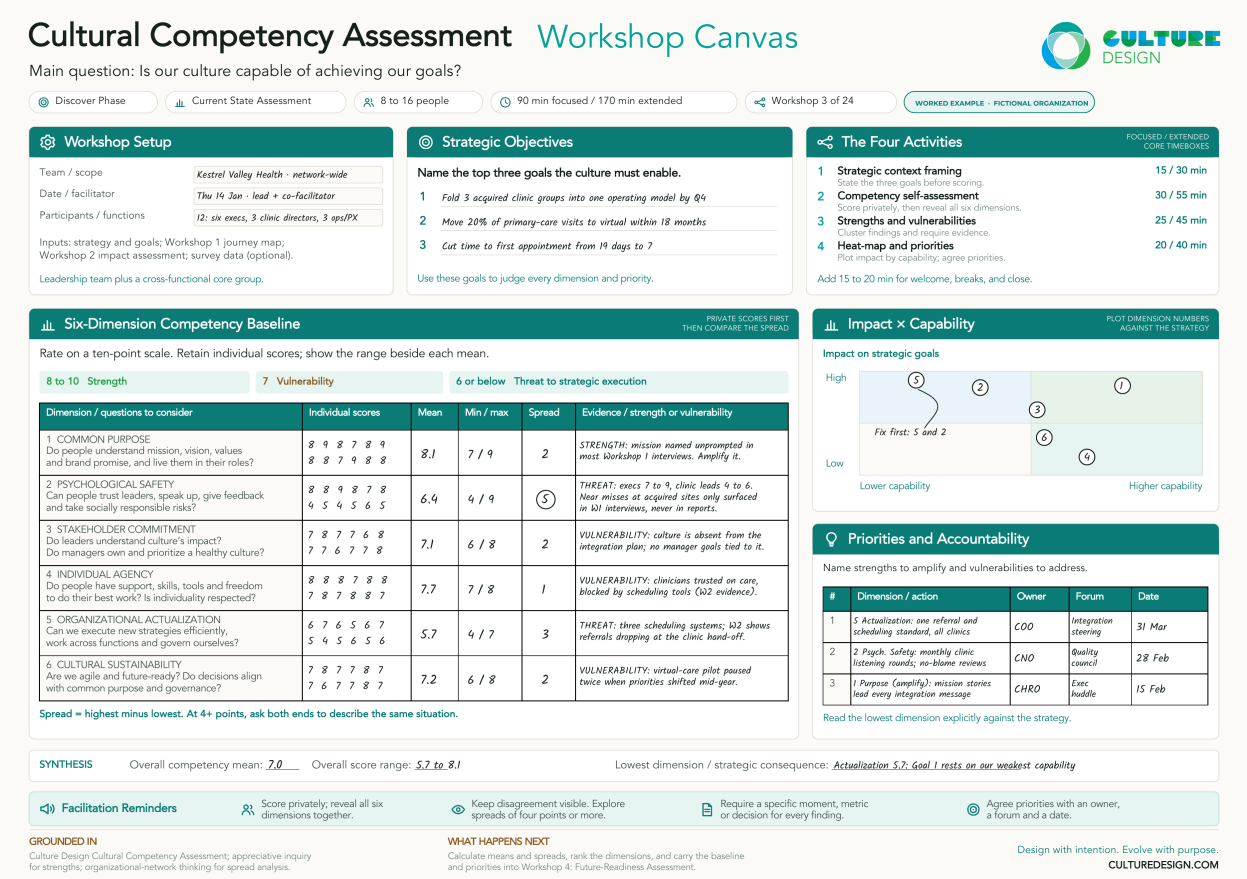
time, the facilitator asks what they have observed that led them to that conclusion, so the group can examine the concern and decide how to respond.

- **Common Purpose [strength to amplify]:** The mission came up unprompted in most of the Workshop 1 stakeholder interviews.
- **Psychological Safety [threat]:** Near misses at the acquired sites surfaced in Workshop 1 interviews and never in incident reports.
- **Organizational Actualization [threat]:** Three scheduling systems remain in use, and the Workshop 2 impact assessment shows referrals dropping at the hand-off between clinics.
- **Stakeholder Commitment [vulnerability]:** Culture does not appear anywhere in the integration plan, and no manager goal is tied to it.
- **Individual Agency [vulnerability]:** Clinicians are trusted with care decisions and then blocked by the scheduling tools.
- **Cultural Sustainability [vulnerability]:** The virtual-care pilot was paused twice when priorities shifted mid-year.

Activity 4 Outcome: The Heat-Map & Priorities - Organizational Actualization and Psychological Safety fall in the high-impact, lower-capability quadrant and take priority. The team will use Common Purpose, a strength in the high-impact, higher-capability quadrant, to support both. Individual Agency remains a vulnerability, but its stronger score and lower impact on these goals make it a lower priority.

#	Dimension & Action	Owner	Forum	Date
1	Organizational Actualization: one referral and scheduling standard across all clinics	COO	Integration steering committee	31 March
2	Psychological Safety: monthly listening rounds at each clinic and a no-blame near-miss review	CNO	Clinical quality council	28 February
3	Common Purpose (amplify): mission stories lead every integration message	CHRO	Executive huddle	15 February

The Synthesis: Organizational Actualization, the lowest dimension at 5.7, is the capability the team needs to integrate the acquired clinics under one operating model. That connects the assessment directly to the first strategic goal. The team carries this finding into Workshop 4, the Future-Readiness Assessment, to identify the capability gaps and assign responsibility for addressing them.



Completed canvas for the fictional Kestrel Valley Health session. Use the blank canvas at the top of the article with your own team before the next planning cycle.

Grounded in: the Culture Design Cultural Competency Assessment, complemented by appreciative inquiry for the strengths work and lightweight organizational-network thinking for the spread analysis.

Schedule this session before your next planning cycle with your leadership team and the eight to sixteen people who run the work. Identify the cultural capabilities you need to strengthen to deliver your strategy.