Sample Organisation Name

ISA Assessment and Debrief Program

QUOTATION

DD YYYY

*Organisation Logo*



# About Veraison

Veraison is a Western Australian owned and operated premium corporate psychology provider that is passionate about assisting both individuals and organisations to reach their full potential. We value genuine partnerships, self-mastery, fun and sustainable results.

Our mission is to inspire human potential, to create organisations with engaged and loyal staff who safely deliver extraordinary results. We partner with organisations to transform leadership capability, workplace relationships and systemic business practises.

We specialise in transforming leadership capability and organisational culture. We are the first organisation in Australia to become accredited and the researchers and product developers work alongside us.

# ISA

The ISA 360 survey measures how you and others perceive your behaviours and beliefs in the context of four Intentional States that are important in safety leadership and it identifies the biggest strengths and the biggest gaps at all levels of leadership. The tool is specifically designed to transform leadership by providing leaders with access to the views, beliefs and behaviours that are enhancing and hindering their current effectiveness.

## Proposed ISA Program for Your Organisation

Based on our conversations to date, Veraison understands Organisation Name require ISA assessment and debrief packages for 40 leaders. The following quotation includes an option to **include a group education session and shorter individual debrief sessions to maximise time for participants.**

Veraison have assembled a team of performance coaches who are ISA accredited practitioners and have decades of collective experience working with leaders from the Safety industry. Our accredited practitioners have varying backgrounds in psychology, counselling and coaching and take a partnership approach to the debrief process by creating a supportive and honest environment to provide feedback, in which transformation can occur.

Veraison has provided options for Your Organisation to consider depending on the final scope of agreed work required and the flexibility needed to ensure all participants are supported throughout the process.

Options include:

1. A per-person rate that includes the comprehensive assessment, self-development guide and individual report and 1.5hr debrief per person.
2. A rate for 40 leaders that includes the comprehensive assessment, self-development guide, individual report and 30 minute debrief (when they take part in a group education session).
3. A rate per group education session (max 22 participants)
4. A rate per Aggregate group report
5. A rate per additional debrief session i.e. with leadership team

Veraison recommends the following ISA program for Your Organisation’s first tranche of leaders (x40);

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| --- | --- | --- | --- |
| **Prelaunch admin & set up**  **w/c 22 July** | **Online survey administration**  **w/c 12 August** | **Reporting** | **Debriefs**  **w/c 23 Sept** |



Veraison to provide administration support

### Prelaunch briefing & comms

Veraison will provide information to the participants prior to the launch of the rater nominations process, and the launch of the ISA surveys. This pre-briefing session is a 30 minute presentation that can be delivered in person, or via Skype/ Zoom.

### Rater nominations & approvals

This process has been agreed with Your Organisation to ensure a seamless administration period for participants and that each individual’s nominated feedback providers are aligned with the operational manager’s views of who should provide feedback.

The rater nominations period will be between 5 August to 9 August allowing participants 5 days to submit their feedback providers. Once approved by the operational managers, the surveys will launch to the participants for self-assessment and to their feedback providers on Monday 19 August.

Veraison will facilitate the rater approvals by creating a data collection platform that will invite each participant to enter the details of their nominated shortlist of feedback providers. Veraison will share the lists with the appropriate ‘approvers’ at Organisation Name to sign off/ make changes and also confirm all contact details provided are correct (noting any typos in email address etc).

Once feedback providers are approved, the surveys will be ready to launch on Monday 19 August.

### Survey Administration Period

The surveys will be live for 2 weeks, with an additional week available as a buffer to allow for any lag in completion. Veraison will track the response rate to ensure all participants complete the survey in the designated time frame and liaise with Organisation Name if there are any issues in meeting the survey administration period deadlines.

### Debriefing Process

The following sessions make up the debriefing process.

**1. Group Education & Aggregate Results Debrief:** We recommend delivering this two-hour session to all participants, and will work with Organisation Name to identify the groups in which to schedule them in. The groups will be determined by the Aggregate results to be debriefed in that session, for example;

* 1 x session to Group 1 & 1 x session to Group 2, delivering the Aggregate results for each of the service areas. OR
* 1 x session to Level 1 & 1 x session to Level 2 (optional) delivery relevant Aggregate results to each of those areas. The second option is recommended, as the groupings are more aligned by level *and* service area.

**2. Individual Debriefs:** After the Group Session in which each participant will receive their Self Development Guide and their Individual Report, their individual debrief session will take place. This individual session is an opportunity to dive deeper into their own results and begin their own professional development. Individual debriefs will be booked in ‘blocks’ and take place at central location per day, providing a more cost-effective option for Organisation Name.

### Recommendations & Next Steps

Veraison will provide Organisation Name with recommendations in the Aggregate group results. These recommendations are based on the data findings and the key areas of improvement and strength within the group. These findings can be discussed with the senior leaders of the organisation and be part of implementing the next steps for the participants’ leadership development. It is recommended an additional action planning meeting take place with key decision makers after the results are debriefed to the participants to look at ‘closing the gaps’ at an organisational level.

## Timeline of Activities

See detailed timeline with additional description of all activities are below:

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| --- | --- | --- |
| **Date** | **Activity** | **Comments** |
| w/c 22 July | **Project plan/ scope approved** | Confirmation of timing and approach presented.  Participant details sent. Approval process confirmed. Refer to additional checklist document for further planning requirements. |
| w/c 5 August | **Briefing session/s (30mins)** | 30 mins presentation/s to brief participants on upcoming ISA project, key dates, requirements for selecting raters etc. |
| w/c 5 August | **Launch rater nominations** | Participants will have 5 days to nominate raters via Get Feedback data collection process.  Ops Managers will review nominations and Veraison will launch surveys with final approved raters on Monday 19th August. |
| w/c 19 August  survey period = 2 weeks. | **Launch ISA assessment to 40 leaders** | Monday 19th August Launch Date.  Survey deadline Friday 30th August.  *Note: 1 week buffer for later comers.*  Hard deadline Friday 6th September. |
| w/c 9 September | **Reporting phase** | ISA Administration – allow 2 weeks for reporting. |
| w/c 23 September | **Group Education Sessions** | 2 hour Group ISA Education Sessions – to create alignment across all participants receiving information on ISA and how it fits with Organisation Name values. These group sessions will also share the Aggregate results relevant to that group, this provides an introduction to reading and understanding the results and allows individuals to start making meaning of their own results. |
| w/c 30 September  debriefing period = two weeks. | **Individual debrief sessions scheduled** | Each participant receives their individual debrief with a ISA accredited performance coach. Sessions will be booked in ‘blocks’ of time and based at a central location to make debriefing process more cost effective for Organisation Name. |
| w/c 7 October onwards | **Aggregate result discussion** | These sessions are an opportunity to go through the key findings from the group Aggregate reports and recommended activities to close the gaps in capability and look at next steps for leadership development. |

# Investment Schedule

The following outlines the fee schedule for the activities proposed above. All costs are inclusive of travel & mileage within the Perth metro area.

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| ISA Program Options | Cost (excl. GST) |
| ISA Assessment and Debrief Package for 40 leaders  Includes:   * Comprehensive ISA assessment including administration support and response rate tracking for 40 participants * 30-60min individual debrief per leader scheduled in ‘blocks’ at central location. * Preparation time to familiarise coach with results * Customised ISA Self-Development Guide per person * Additional follow up and coaching materials if required | **$20,600.00 for 40 leaders**  *($515.00 per person – discounted rate from $650.00)* |
| ISA Education & Group Aggregate Debriefs (recommend x 4 as outlined)  Includes:   * 2 hour face to face facilitated session with accredited ISA coach to align participants on ISA * prior to 1:1 debriefs * Discussion aligning to Organisation Name values   Discussion about Aggregate results to explain tool and set participants up to receive their own results   * Preparation of customised presentation using group results and Organisation Name values. * Recommend 4 sessions/ 4 reports | **$6,880.00**  *($840.00*  *per session x4*  *$880.00*  *per report x4)* |
| ISA Project Management  Includes;   * Client contact, support & liaison (including email, phone and face to face) throughout ISA program * Scheduling of all activities * Preparation and administration time as needed * Progress reporting/updates as needed * Delivery of 30 min ISA briefing sessions to prepare participants for surveys * Management of ISA feedback providers approval process | **$1,260.00** |
| TOTAL | **$22,490.00** |
| Additional debriefs (i.e. with Leadership team) – Optional   * 2 hour debrief session to share results and discuss recommendations * Create alignment to Organisation Name values, and planned leadership development activities * Preparation of custom report and debrief materials   Additional sub-group in Organisational Report (e.g. area, level, department) | **$840.00**  **per session**  **$400.00 per subgroup**  **Report** |

*Please note: cancellation of group or individual debriefs within 24 hours will be billed at 50% of fees outlined.*

If you have any queries or require any more information, please contact us. We look forward to the opportunity to continue our partnership with **Organisation Name**.

Program Coordinator

Contact Name

Email

Telephone Number

**Licensee**

Address