

A culture audit is simply holding a mirror to the organization: not to judge, but to understand

## Facilitator Guide for Culture Audit

### Introduction

The [OCTAPACE Culture Assessment](#) helps organizations understand the values and behaviours that shape their work environment.

This tool helps you assess:

- How your staff perceive your organizational culture
- Whether current behaviours support your goals
- What cultural strengths exist
- What areas need attention (leadership, communication, inclusion, accountability, innovation)

This guide is designed so that **any HR manager, People & Culture Head, CEO, DEI Head, Gender Champions, or team leader/managers can roll out the assessment independently** across their organization.

### OCTAPACE stands for

- **O**penness: Spontaneous expression of feelings and thoughts, and the sharing of these without defensiveness. Openness is in both directions, receiving and giving. Both these may relate to ideas (including suggestions), feedback (including criticism), and feelings.
- **C**onfrontation: Confrontation can be defined as facing rather than shying away from problems. It also implies deeper analysis of interpersonal problems. All this involves taking up challenges. The term confrontation is being used with some reservation and means putting up a front, as contrasted with putting one's back (escaping) to the problem. A better term would be confrontation-cum-exploration (CE).
- **T**rust: Trust is not used here in the moral sense. It is reflected in maintaining the confidentiality of information shared by others, and in not misusing it. It is also reflected in a sense of assurance that others will help when such help is needed and will honour mutual commitments and obligations. Trust is also reflected in accepting what another person says at face value, and not searching for ulterior motives. Trust is an extremely important ingredient in organisation building processes.
- **A**uthenticity: Authenticity is the congruence between what one feels, says and does. It is reflected in owning up one's mistakes, and in unreserved sharing of feelings. Authenticity is closer to

openness.

- **Pro-action:** Pro-action means taking initiative, pre-planning, taking preventive action, and calculating the payoffs of an alternative course before taking action.
- **Autonomy:** Autonomy is using and giving freedom to plan and act in one's own sphere. It means respecting and encouraging individual and role autonomy. It develops mutual respect and is likely to result in willingness to take responsibility, individual initiative, better succession planning.
- **Collaboration (teamwork):** Collaboration is giving help to, and asking for help from, others. It means working together (individuals and groups) to solve problems and team spirit.
- **Experimentation:** Experimenting means using and encouraging innovative approaches to solve problems; using feedback for improving, taking a fresh look at things, and encouraging creativity.

## Step-by-Step Roll-Out Plan

### Step 1: Identify Target Groups

Suggested groups:

- Senior leadership
- Middle management
- Field teams
- Functional teams (HR, M&E, Finance, Programs)

### Step 2: Communicate Purpose Clearly

What to tell staff:

- It is **not an evaluation of individuals**
- It is an **assessment of culture**

Their responses will help improve policies, communication, leadership, HR systems, and team dynamics

### Step 3: Share the Survey

You may:

- Use a Google Form (recommended)
- Use printed copies for field teams
- Share links via WhatsApp for easy access

### Step 4: Ensure Safe Participation

- Make responses anonymous
- Assure no negative consequences
- Clarify that leaders will receive only aggregated data

### Step 5: Score the Responses

Convert the responses using the scoring guide (1-4 scale as per tool).

Please use this [answer key](#) to calculate scores for each OCTAPACE dimension.

## Step 6: Interpret the Scores

A score merely indicates the presence or absence of behaviours and experiences associated with that value. What matters is how relevant that value is to the organization's goals, priorities and the kind of culture it wants to build.

For example: If an organization aims for innovation, Experimentation scores become critical. If it wants to build inclusive leadership pipelines, Trust, Openness and Autonomy may matter more.

The goal is not to "score high" everywhere. The goal is to **understand the culture as it is**, and to consciously shape it to serve the organization's mission, ethics and values

## Step 7: Use the Score to Start a Conversation, Not End One

A higher or lower score should lead to reflective discussions such as:

- Is this value important for our current work?
- What might be influencing this score?
- Do people across different roles experience this value differently?
- What practical changes could strengthen this value?

## Step 8: Create a Culture Action Plan

A simple template:

- What needs work?
- Why does it matter?
- What will we change in processes, systems, or policies? Such as: Celebrating heroes, rewarding practices, sharing stories, etc.
- Who will own it?
- Timeline

## Important!

Scores measure the strength or visibility of each value and not whether the organisation has a "good" or "bad" culture.

A low score on one or two dimensions just means the organisation isn't strongly oriented toward those particular values, which may or may not be a problem depending on its strategy or context.

**For example,** If Trust scores high (4.3) and Experimentation scores low (2.4), it doesn't mean the organisation's culture is poor. It means the team is high on relational safety but tends to be cautious about taking risks or trying new ideas. This duo score is great for an organisation where reliability and trust among teams matters more than rapid innovation.

## Closing Note

*There are other tools and frameworks also available, OCTAPACE is one of the widely used standard tool with an Indian approach developed by Dr. Udai Pareek and T.V. Rao to diagnose organisational culture through eight values that support openness and development.*

*All the best for your journey in conducting this exercise. If you need deeper support or guided facilitation, please feel free to write back to us: [connect@equilead.org](mailto:connect@equilead.org)*