

# **Cultural Values Assessment (CVA)**

Example



BARRETT VALUES CENTRE

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To build a high performing, values-driven organisation that engenders high levels of employee engagement, requires leadership commitment and an ongoing process of values management that becomes deeply engrained into the ethos of the organisation. The starting point is to find out what is and what is not working.

This Cultural Values Assessment provides you with an overview of what is important to your people, how they see the organisation operating now and provides you with a roadmap for change. Key performance indicators, such as values alignment and the Cultural Entropy score, can help you measure the success of change initiatives as you monitor progress and needs year by year.

Additional recommended reading:

- [The Values Driven Organization](#)
- [The Metrics of Human Consciousness](#)

## EXECUTIVE SUMMARY AND RECOMMENDATIONS

*The following pages provide a quick, high level synopsis of the findings contained later in this report.*

### What is important to the people of the organisation?

*Reference top Personal Values.*

- Building mutual confidence with others, through supportive and just interactions
- Dedication and a desire to be successful
- Having a positive impact on others
- Fostering proficiency and high standards in their endeavours
- A competent and rational approach

### What is their current experience of the organisation?

*See top Current Culture Values.*

- Group efforts to meet set business objectives
- Working closely with customers to support their needs and build a positive reputation in the industry
- Efforts to improve the bottom line
- People hampered by a lack of group cooperation, unclear direction and inefficient systems and processes

### What do they see as important for the future of the organisation?

*See top Desired Culture Values.*

- Planning for the future of the business, with focus on building a solid financial footing
- Continued attention to working together to meet customer needs
- Building mutual confidence in one another, through just interactions and professional behaviour
- Efforts to streamline working practices and raise standards

### Additional insights

1. Participants have highlighted some particular values that may be helpful to focus on, to help overcome the performance problems seen. These are 'efficiency', 'quality' and 'professionalism'. Note that these values occur at Level 3- Self-esteem which is of personal importance to this group. Two of these values are also personal values of the people.
2. Look also at the values requested at Level 5 – Internal Cohesion and Level 7- Service. In the Current Culture there are gaps at these levels and participants are seeking greater emphasis on the levels which support the Common Good, particularly in building a sense of internal community spirit and planning for the future.
3. In the Business Needs Scorecard (BNS) the largest percentage shift is requested in the area of Culture (Direction/ Communication). Look at the potentially limiting values that are undermining this area and consider how the new values jumps 'positive attitude' and 'leading by example' can be more positively emphasised in the workplace to help provide stronger leadership.

### Suggestions for implementing change

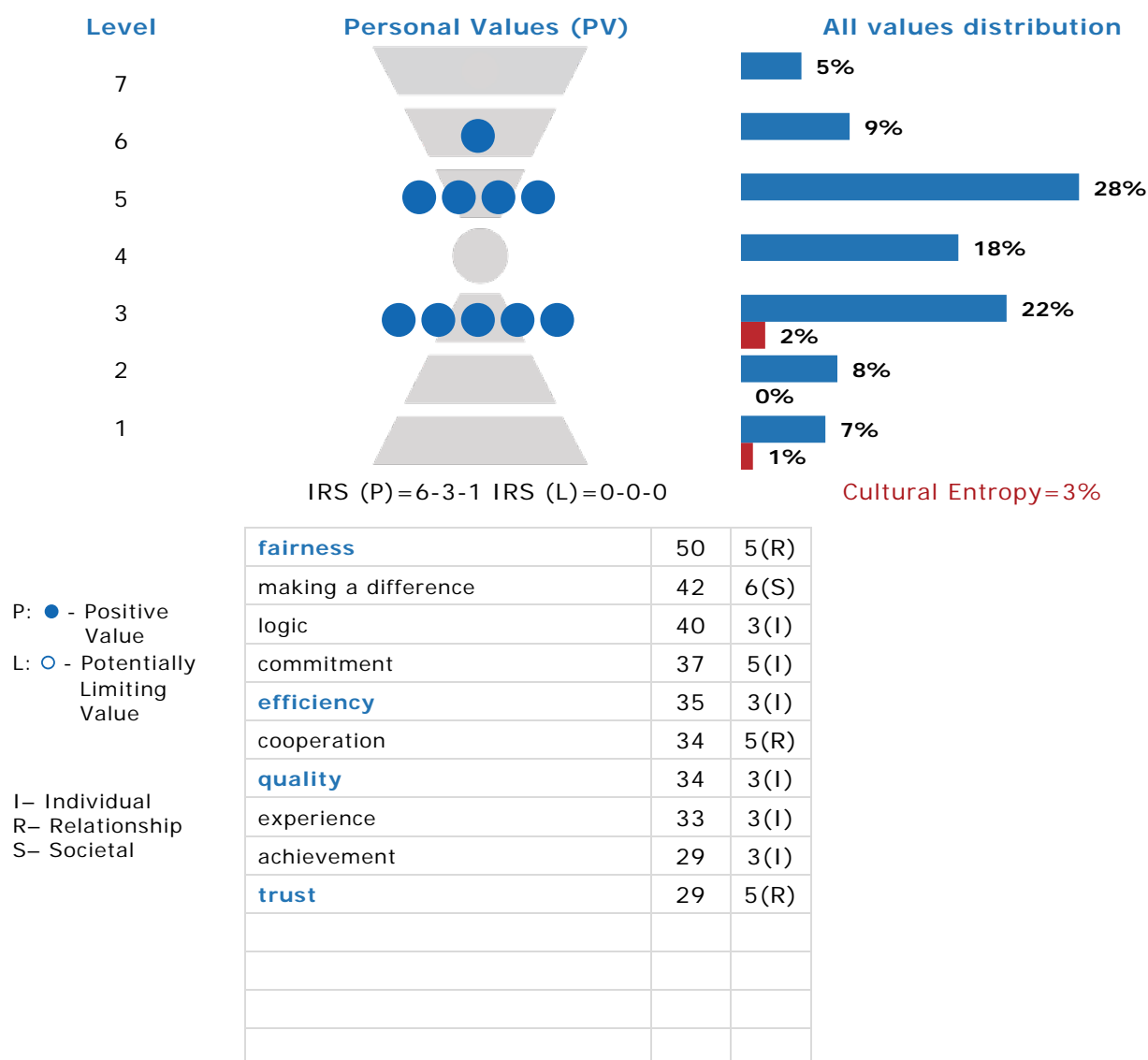
1. Develop a plan to deliver internal communication around these results. Remember to celebrate strengths, as well as looking at what can be improved.
2. Consider setting up focus groups to gain greater understanding around specific areas or issues and planning steps for improvement. An overview of steps you might take can be found in [Get Connected](#) pages 52-54 or in the following exercise: [From CVA to Action](#)
3. Examine how the business strategy aligns with the culture of the organisation as seen in the results. [Align Strategy & Culture](#)
4. People seek more focus around ongoing development and employee participation. Understand what they are asking for in this regard. [Agreeing behaviours connected to desired values](#)

5. Following these communication exercises, identify which are the key outcomes or processes that the group wants to achieve or improve. Here are some examples of possible next steps:
  - a) How might you build 'trust' as people ask? [Tools to build trust](#)
  - b) What steps can you take to honour the call for more focus on relationships across the group?
  - c) To what degree is the gap at Level 7 and the BNS area of Societal Contribution a missing need in the business? There is an underlying call for more focus here. Find out from participants what they believe the key priority to be.
6. There is clearly a large call for change. Consider if you undergo a transformation project, how you might help everyone understand the change journey and support them on it. Download the free book, [The Dynamics of Change](#), to give you an overview of things to consider. The following exercises may also be helpful: [The Change Curve](#) [Important Questions](#) [Force Field Analysis](#)
7. What help might the leaders of the organisation need to help understand and address both the tangible and intangible aspects of any changes planned? [Balanced Action Plan](#)
8. Consider what values your organisation wants to espouse for the long-term. Then, define a set of shared values, 3-4 maximum, as choosing more will undermine peoples' ability to connect to and demonstrate the chosen values. Define what each of these values specifically mean and what behaviours would be expected to support them. These behaviours can then be used for performance measurement regarding how well managers and senior executives are "living the values". In addition, determine what would undermine the espoused values. Make the values and behaviours pervasive throughout your organisation, by integrating them into employee orientation programs, performance management, promotion criteria, leadership competencies and succession planning. Note that the following values are Personal Values of these people, as well as values they want in their Desired Culture: **fairness, efficiency, quality, trust**. To what degree might these values support the long-term success of the organisation?



## SECTION 1: PERSONAL VALUES

*Understanding the people of your organisation*



**What is important to these people? - Derived from top Personal Values.**

- Building mutual confidence with others, through supportive and just interactions
- Dedication and a desire to be successful
- Having a positive impact on others
- Fostering proficiency and high standards in their endeavours
- A competent and rational approach

**What motivates them?** – *See concentration of top values and full values distribution by level.*

**Level 3 – Self-esteem** reflects a desire to be successful.

**Level 5 – Internal Cohesion** represents inner stability, maturity and a search for purpose.

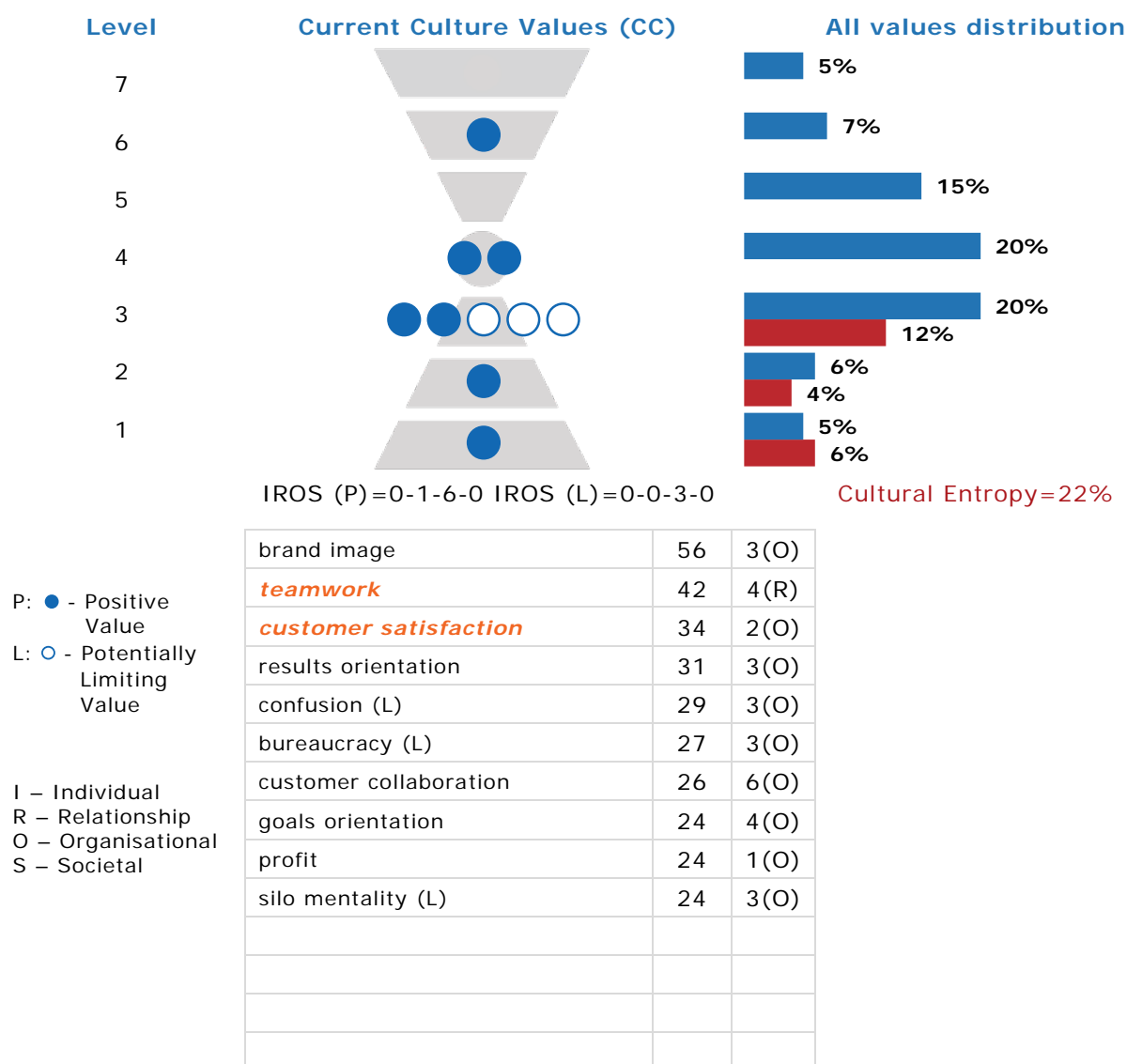
**What is their main focus?** – *Refers to top values types favouring Individual, Relationship or Societal Values (IRS). Usually focus is on “Individual” type values.*

The type of values selected shows most focus on their personal abilities.

*How might knowing your people better, help the organisation to frame its policies, practices and procedures, and further engage employees?*

## SECTION 2: CURRENT CULTURE VALUES

*An overview of participants' current experience of the organisation*



**How is the organisation seen to operate?** – Refer to top Current Culture values.

- Group efforts to meet set business objectives
- Working closely with customers to support their needs and build a positive reputation in the industry
- Efforts to improve the bottom line
- People hampered by a lack of group cooperation, unclear direction and inefficient systems and processes

**What areas receive most focus in the organisation?** - See concentration of top values and full values distribution by level.

**Level 3 - Self-esteem** is concerned with performance, systems and processes.

**Level 4 - Transformation** represents an openness to change and involve employees.

Note that some of this focus is potentially limiting and may be adversely affecting the organisation.

*How do you see this focus expressed in the behaviours, strategy and structure of your organisation?*

**Which types of values receive most attention?** - Consider the balance between people-focus (IRS) and business-focus (O – Organisational values).

The range of top values selected shows most emphasis is placed on business needs, though from both a positive and potentially limiting perspective.

*Is enough attention placed on each area? Is one area more heavily represented than others? If so, why?*

**What areas lack clear positive focus?** – Levels without top positive Current Culture values are either unconsciously taken care of, a blind spot, or a next area of growth.

There are no top positive values in the following levels:

Level 5 - Internal Cohesion shows a sense purpose and community within the group.

Level 7 - Service focuses on long-term sustainability through care for the world and its people.

*What concerns, if any, do these gaps raise for you? What do you feel is the next area of growth for your organisation?*

**What potential issues impact the group?** – Look at the top potentially limiting values represented by a white dot.

Consider the causes and corrective actions behind these values:

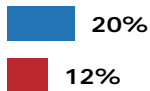


**Confusion** tends to result from a lack of understanding or clear direction. It can lead to inefficiency and frustration.

**Bureaucracy** can be a form of control. Too much bureaucracy can block creativity and entrepreneurial spirit and may erode accountability and trust. Bureaucracy can lead to ineffectiveness.

**Silo mentality** may be a reflection of disconnection, lack of knowledge sharing and hindered capability for achieving common goals and community.



**Where is the dysfunction within the system?** - *The Cultural Entropy score equates to the percentage of votes for potentially limiting values, which can stem from internal or external factors, or from the fear-based actions and behaviours of leaders, managers and supervisors. A Cultural Entropy score of 10% or lower is healthy. Note, report diagrams may show a variance in score due to rounding to the nearest whole number.*

LEVEL	Potentially Limiting Values (votes)	Cultural Entropy %
<b>3</b> 	confusion (29) bureaucracy (27) silo mentality (24) hierarchy (17) long hours (12) information hoarding (9) power (6)	12% of total votes
<b>2</b> 	empire building (11) internal competition (11) manipulation (9) blame (6)	4% of total votes
<b>1</b> 	cost reduction (20) control (15) short-term focus (11) caution (10) job insecurity (7) exploitation (5)	6% of total votes

**A Cultural Entropy score of 22% reflects significant issues requiring cultural and structural transformation, as well as leadership coaching.**

*Discuss with participants the degree to which these potentially limiting values impede their work. Determine where to focus attention for improvements.*

The Cultural Entropy percentage is most concentrated at Level 3 - Self-esteem, indicating concerns affecting business performance.

Note where negative focus is undermining positive efforts.

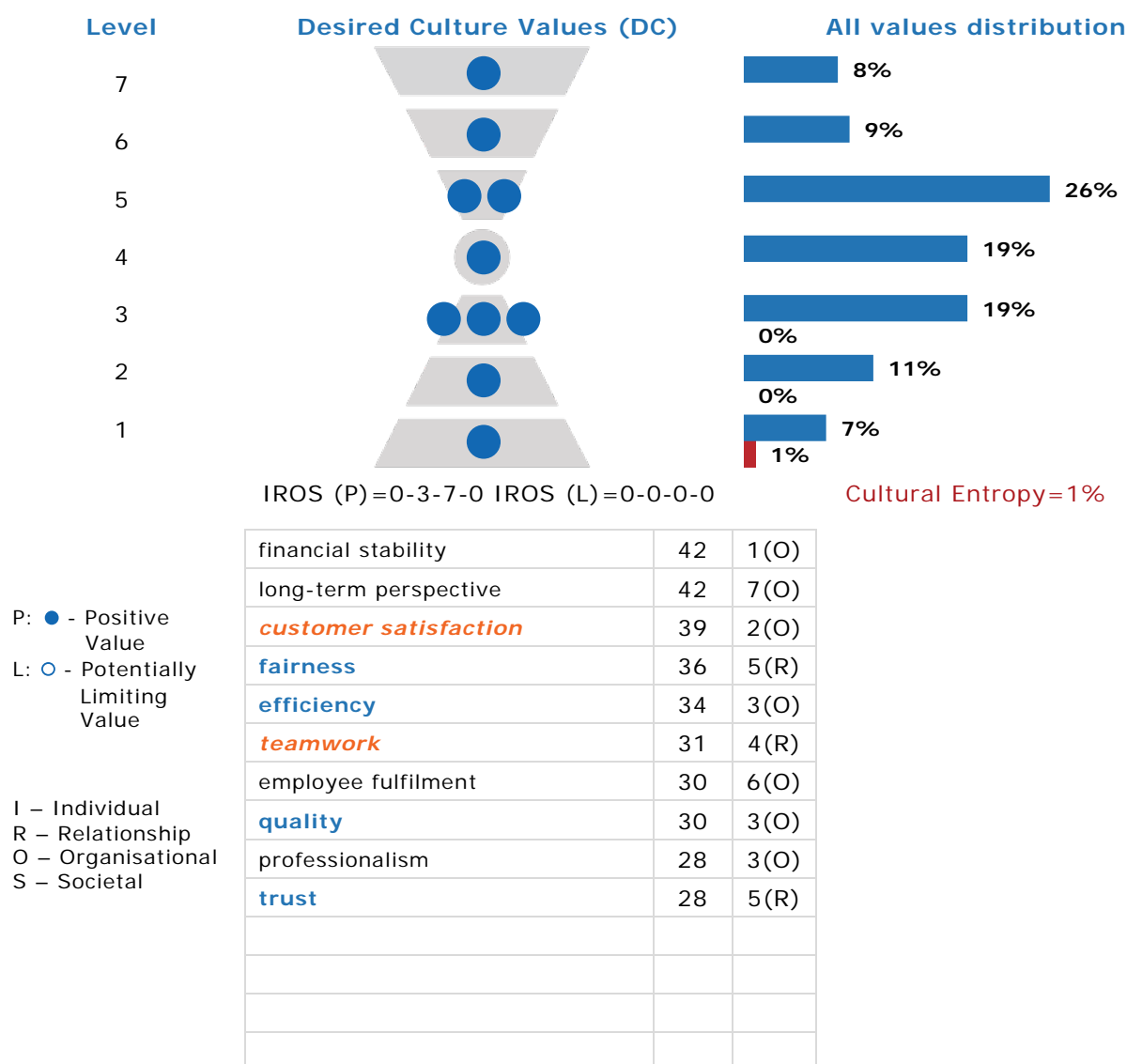
**What are the key concerns for the group?** – *See potentially limiting values in table above.*

- Employees feel overworked and are faced with navigating rigid internal systems, processes and structures
- There is an over-emphasis on minimising expenditure and a failure to plan ahead
- A lack of clarity and empowerment is hindering performance
- There are issues impeding cooperation across the group

*How do these situations show up in the workplace? What behaviours do people experience and how does this impact them?*

## SECTION 3: DESIRED CULTURE VALUES

*An overview of participants' desires for the future of the organisation*



**What is seen as essential to reach the organisation's highest potential? – Refer to top Desired Culture values.**

- Planning for the future of the business, with focus on building a solid financial footing
- Continued attention to working together to meet customer needs
- Building mutual confidence in one another, through just interactions and professional behaviour
- Efforts to streamline working practices and raise standards

**Where do people want to see most focus in future?** - *See concentration of top values and full values distribution by level.*

The top values and full values distribution show a desire for most attention to:

**Level 3 - Self-esteem** concerning performance, systems and processes.

**Level 5 - Internal Cohesion** reflecting the strength of community spirit inside a group.

Values are spread across all levels, reflecting a call for greater resilience.

**What types of values do they want to promote moving forward?** – *Note shifts in focus from top Current to Desired Culture values.*

There is a call for the organisation to place more positive attention on business needs and on the way in which people interact with one another.

*What new behaviours and actions will support the development of your organisation?*

**What additional requests are emerging?** – *The following values received the greatest increase in votes from Current to Desired Culture. More people want to experience these values in the culture; these values jumps show where the organisation can build engagement, as well as provide more insight into the themes emerging from the Desired Culture.*

Value	Level (IROS)	Current Culture Votes	Desired Culture Votes	Jump
<b>financial stability</b>	<b>1 (O)</b>	<b>16</b>	<b>42</b>	<b>26</b>
<b>employee fulfilment</b>	<b>6 (O)</b>	<b>5</b>	<b>30</b>	<b>25</b>
<b>long-term perspective</b>	<b>7 (O)</b>	<b>19</b>	<b>42</b>	<b>23</b>
<b>efficiency</b>	<b>3 (O)</b>	<b>13</b>	<b>34</b>	<b>21</b>
<b>fairness</b>	<b>5 (R)</b>	<b>17</b>	<b>36</b>	<b>19</b>
<b>trust</b>	<b>5 (R)</b>	<b>9</b>	<b>28</b>	<b>19</b>
personal growth	4 (I)	5	24	19
positive attitude	5 (I)	11	27	16
leading by example	5 (R)	9	25	16
professional growth	3 (O)	6	22	16

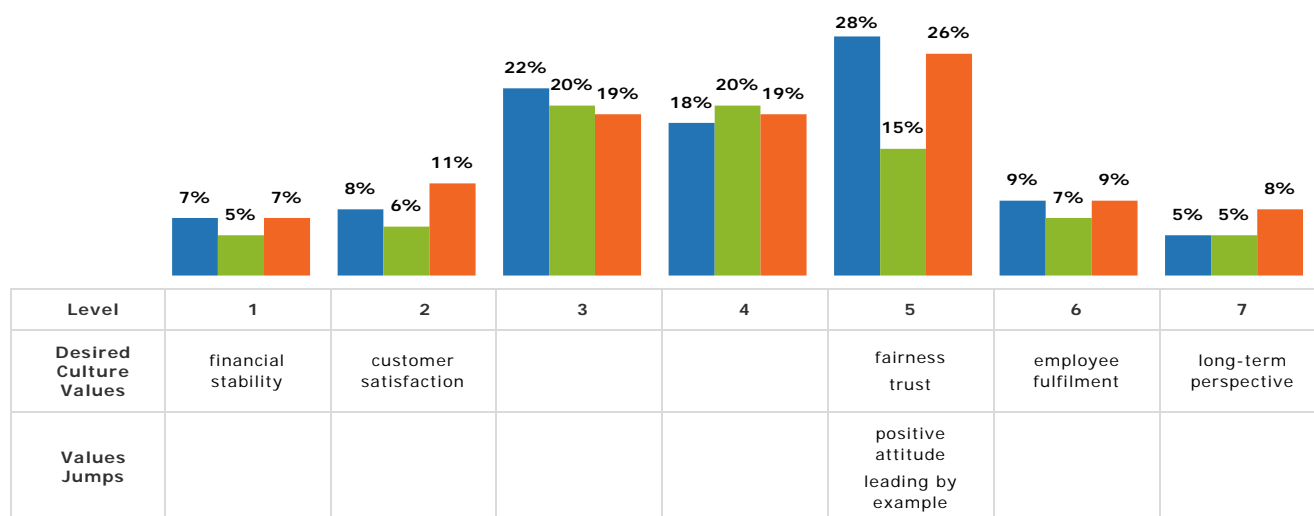
**Values in bold are top values in the Desired Culture.**

Those values, which are not top desired values, show underlying shifts in focus that may be worthy of additional attention:

- Staff members seek opportunities to develop and advance their careers
- They want to experience a sense of optimism in the workplace and see leaders demonstrating expected behaviours

*What areas appear to require most focus, and how might you incorporate some of these values in your efforts to promote cultural change?*

**Which areas are of rising importance?** – The distribution of all positive values by level clearly shows which levels are of rising importance (see increase from green/Current to orange/Desired). The table includes the main values associated with the rising requests.



Personal Values ■

Current Culture Values ■

Desired Culture Values ■

The biggest shift is requested at Level 5 – Internal Cohesion, indicating a request to build a greater sense of internal community spirit in the group.

*What do you see as the call for action from the group, and how might the values included in this table help address these challenges?*

## SECTION 4: OTHER INDICES

*Additional perspectives on the data to reveal other areas of significance*

**Values Matches** - See repeating top values, which indicate cultural alignment.

### Personal/Current Culture Matches: 0

Indicates no clear connection between what is important to the people and their experience at work. This lack of alignment reduces commitment and performance. In a highly aligned culture, one would expect to see three or four matching values.

### Current/Desired Culture Matches: 2

Shows some confidence in the current direction of your organisation, yet with a call for change to strengthen performance and enhance commitment.

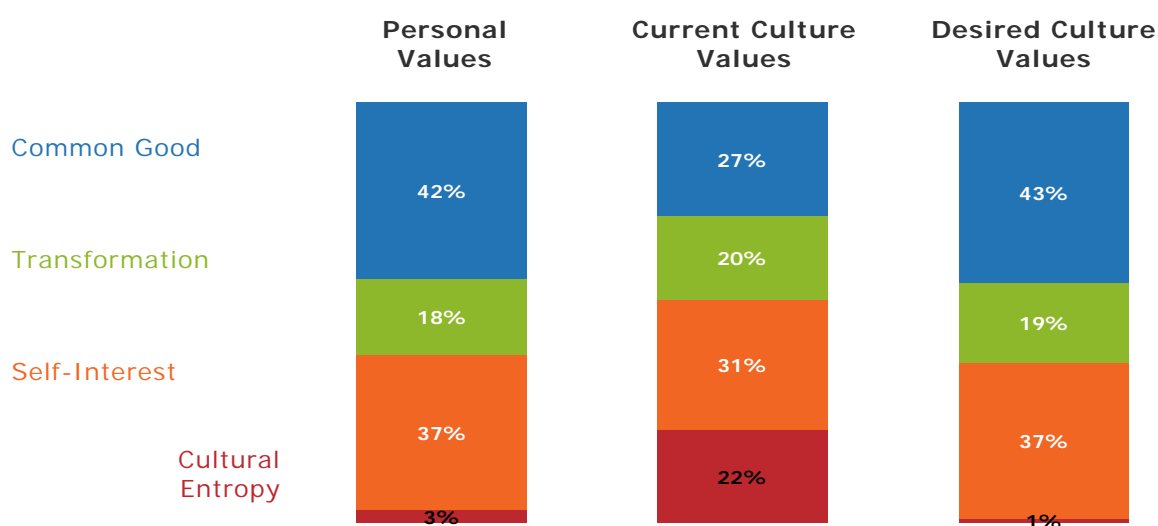
### Unsatisfied Personal Values requested in Desired Culture: 4

Not only are these values important to the people, but participants also believe they can improve the organisation's performance. These new requests are:

fairness  
efficiency  
quality  
trust

*How confident are people that the group is on the right track? What areas appear relevant to focus upon next?*

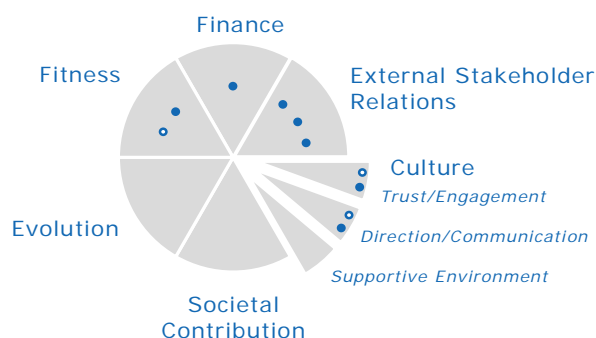
**CTS Values Distribution** – Here, votes for all values are grouped according to three major drivers: Self-Interest, composed of Levels 1, 2 and 3, Transformation at Level 4 concerning adaptability and employee participation, and the Common Good, made up of Levels 5, 6 and 7.



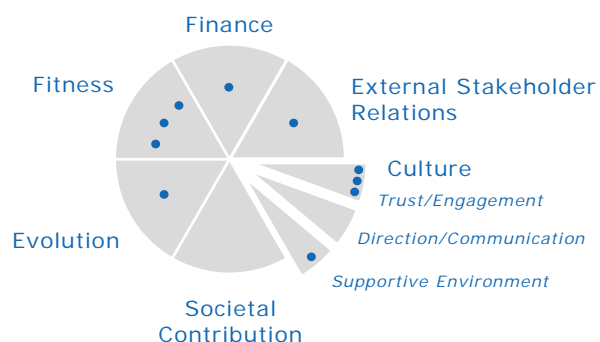
Misalignment between Current and Desired values distribution suggests a need to change direction. Participants seek greater emphasis on the Common Good.

**Business Needs Scorecard (BNS)** – The top Current and Desired values are displayed according to six key business indicators that can help guide strategy for ongoing success.

### Current Culture Values



### Desired Culture Values



		Current Culture	Desired Culture
	<b>Finance</b>	profit	financial stability
	<b>Fitness</b>	results orientation bureaucracy (L)	efficiency quality professionalism
	<b>External Stakeholder Relations</b>	brand image customer satisfaction customer collaboration	customer satisfaction
	<b>Evolution</b>		long-term perspective
<b>Culture</b>	<b>Trust/Engagement</b>	teamwork silo mentality (L)	teamwork employee fulfilment trust
	<b>Direction/Communication</b>	confusion (L) goals orientation	
	<b>Supportive Environment</b>		fairness
	<b>Societal Contribution</b>		

#### Current Culture:

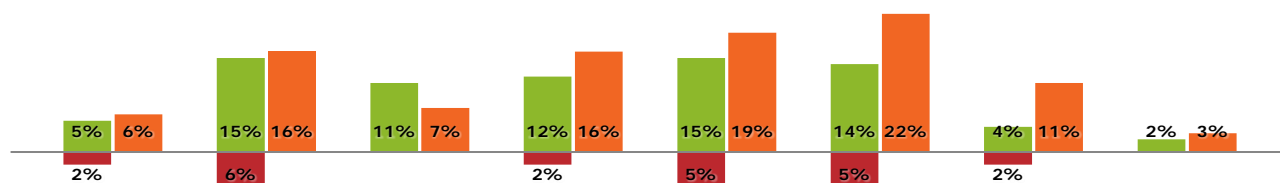
There are issues affecting business performance and how people work together.

#### Desired Culture:

The new call is to focus on raising standards, building for the future and creating a more cohesive and employee-friendly workplace.

*Is this gap unconsciously addressed, a blind spot, or a next area for development? What areas may require focus to promote the group's overall business success?*

**BNS Values Distribution** – Viewing all the Organisational values according to their BNS category reveals where people see a need for greater strategic focus (note increase from green/Current to orange/Desired). The table shows the top values and jumps associated with the increased focus. Potentially limiting values reveal what is causing dysfunction in each area.



	Finance	Fitness	External Stakeholder Relations	Evolution	Trust/Engagement	Direction/Communication	Supportive Environment	Societal Contribution
					Culture			
<b>Desired Values</b>	financial stability	efficiency quality professionalism		long-term perspective	teamwork employee fulfilment trust		fairness	
<b>Values Jumps</b>				personal growth professional growth		positive attitude leading by example		
<b>Potentially Limiting Values</b>	cost reduction	bureaucracy long hours empire building internal competition		short-term focus caution	silo mentality control blame power	confusion hierarchy information hoarding	manipulation job insecurity exploitation	

Positive Values - Current Culture ■ Cultural Entropy: Current Culture ■ Positive Values - Desired Culture ■

The biggest shift among positive values is requested in Culture- Direction/ Communication, which denotes a request to increase focus on decision making and how people communicate and share information.

*Review the areas where the Cultural Entropy percentage is highest, to see what may be undermining the business' ability to utilise its full potential. Look at where change is requested and review the strategic plans of the business. How are these categories covered by existing activities, and what requires more focus? Consider which values in the table will help you address any concerns.*



## SEVEN LEVELS OF PERSONAL CONSCIOUSNESS

### Levels of Consciousness

### Positive Focus/ Excessive Focus



### Distribution of Personal Consciousness

Individuals and organisations do not operate from any one single level of consciousness. They tend to be clustered around three or four levels. Individuals are usually focused at levels 1 through 5, usually with a particular emphasis at level 5.

#### Level 1: Survival

Level 1 focuses on physical survival and safety. It includes values such as financial stability, health, nutrition and self-discipline.

The potentially limiting aspects of this level are generated from fears around not having enough and not being able to survive. Potentially limiting values include greed, control and caution.

#### Level 2: Relationship

Level 2 focuses on the quality of interpersonal relationships in an individual's life. It includes values such as open communication, family, friendship, conflict resolution, and respect.

The potentially limiting aspects of this level are generated from fears around not belonging and not being acknowledged. Potentially limiting values at this level include rivalry, intolerance and being liked.

### **Level 3: Self-esteem**

Level 3 focuses on an individual's need to feel a sense of personal self-worth. It includes such values as being the best, ambition, career focus, and reward.

The potentially limiting aspects of this level are generated from fears about not being enough in the eyes of others, and a lack of positive self-regard. Potentially limiting values include status, arrogance and personal image.

*Note: there are no potentially limiting values in levels 4 to 7.*

### **Level 4: Transformation**

Level 4 focuses on self-actualisation and personal growth. It contains values such as courage, accountability, responsibility, knowledge, and independence.

This is the level at which individuals overcome the anxieties and fears they are holding onto from the first three levels of consciousness. It is also the level where individuals begin to find balance in their lives and source their decision-making from their values rather than their beliefs.

### **Level 5: Internal cohesion**

Level 5 focuses on the individual's search for meaning. Individuals operating at this level no longer think in terms of a job or career, but of aligning their work with their personal sense of mission. This level contains values such as commitment, creativity, enthusiasm, humour/fun, excellence, generosity and honesty.

### **Level 6: Making a difference**

Level 6 focuses on actualising the individual's sense of mission by making a positive difference in the world. Individuals operating at this level seek to cultivate their intuition as their principal means of making decisions. They also recognize the importance of working with others to leverage their impact on the world. This level contains values such as empathy, counselling, community work, and environmental awareness.

### **Level 7: Service**

Level 7 is attained when making a difference becomes a way of life. It reflects the highest order of internal and external connectedness and shows up as self-less service to others or to a cause. Individuals operating at this level of consciousness display wisdom, compassion, and forgiveness, and are at ease with uncertainty. They have a global perspective. They are concerned about issues such as social justice, human rights and future generations.

## SEVEN LEVELS OF ORGANISATIONAL CONSCIOUSNESS

### Levels of Consciousness

### Positive Focus/ Excessive Focus



### Distribution of Consciousness

Many organisations tend to be focused in the first three levels of consciousness – Level 1: profit and growth, Level 2: customer satisfaction and employee recognition, and Level 3: productivity, efficiency and quality. The most successful organisations live values and behaviours that are distributed across all seven of the levels, showing Full Spectrum Consciousness.

### Level 1: Survival

Level 1 focuses on growth and survival. It includes values such as profit, organisational growth, employee health and safety, and shareholder value.

The potentially limiting aspects of this level are generated from fears about not having enough and not being in control. This leads to micromanagement, territorial behaviour, excessive caution and exploitation.

## Level 2: Relationship

Level 2 focuses on the quality of interpersonal relationships between employees, and between employees and customers. It includes values such as open communication, conflict resolution, customer satisfaction, loyalty, and respect.

The potentially limiting aspects of this level are generated through fears around not belonging and not being acknowledged. This leads to rivalry, internal competition, manipulation, and conformity.

## Level 3: Self-Esteem

Level 3 focuses on pride in performance, best business practices and effectiveness. Examples of values at this level include productivity, excellence, efficiency, professional growth, skill development, and quality.

The potentially limiting aspects of this level are generated through fears about not being enough, and low self-worth. This leads to arrogance, complacency, bureaucracy, and power seeking.

*Note: there are no potentially limiting values in levels 4 to 7.*

## Level 4: Transformation

Level 4 focuses on adaptability and continuous renewal. It includes values such as accountability, employee participation, learning, innovation, teamwork, diversity, personal development, and knowledge sharing.

## Level 5: Internal Cohesion

Level 5 focuses on building a sense of internal cohesion in the organisation. It includes values such as trust, integrity, honesty, value awareness, shared vision, cooperation, fairness and generosity. The by-products of this sense of cohesion are enjoyment, enthusiasm, passion, commitment, and creativity.

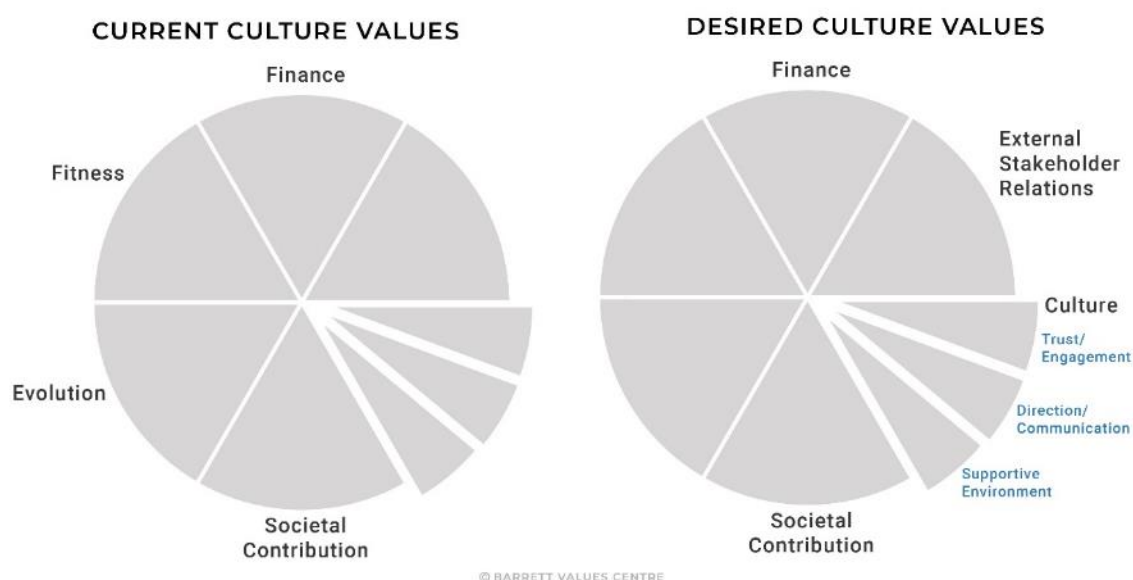
## Level 6: Making a Difference

Level 6 focuses on deepening the internal connectedness and expanding the external connectedness. Inside the organisation it includes values such as mentoring, leadership development, and coaching. Outside the organisation it includes values such as strategic alliances, partnerships, customer and supplier collaboration, community involvement, environmental awareness, sustainability, and making a difference.

## Level 7: Service

Level 7 takes internal connectedness to a deeper level and a more expanded external connectedness. Inside an organisation, it includes values such as wisdom, forgiveness, humility, and compassion. Externally it includes values such as social justice, long-term perspective, global perspective, ethics, and future generations.

## THE BUSINESS NEEDS SCORECARD



While the Seven Levels Model examines values from a cultural perspective, the Business Needs Scorecard (BNS) places the values in a business context. By looking at the areas of current and desired focus, the BNS can be used to help guide an organisation's strategy for long-term success. These areas include:

### Finance

Finance looks at economic health and financial growth with values and behaviours that have a direct impact on growth, the bottom line and investor interests.

### Fitness

Fitness focuses on performance, systems and processes. Values and behaviours here have a direct impact on performance, quality and the effective delivery of products/services.

### External Stakeholder Relations

External Stakeholder Relations highlights relationships with customers and other external stakeholders. This area includes values and behaviours that have a direct impact on the relationship with customers, the market, suppliers, and other strategic partners.

### Evolution

Evolution covers innovation, group development and learning. Values and behaviours represented here have a direct impact on the development of people, processes, products/ services and ways of thinking.

### Societal Contribution

Societal Contribution indicates emphasis on social and environmental responsibility. Values and behaviours appearing in this area have a direct impact on the relationship of the organisation to the local community or society.

## Culture

This section includes the values and behaviours that have an impact on the culture of the group and is split into three subsections:

### Trust/Engagement

Trust/Engagement relates to employees feeling empowered and able to contribute. This area includes values and behaviours that bring people together, build mutual confidence and encourage employees to participate.

### Direction/ Communication

Direction/Communication shows focus on decision making and how people communicate. Values and behaviours that guide decision making and express how people communicate and exchange information are seen here.

### Supportive Environment

Supportive Environment concerns employees feeling cared for and treated fairly. Values and behaviours in this area have a direct impact on how people are treated and looked after within the organisation.

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