Culture Assessment

Example

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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 Culture 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 Culture Entropy score can help you measure the success of change initiatives as you monitor progress and needs year by year.

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.

- Efforts to establish mutual confidence and show support for others
- Dedication and a drive to be successful, while contributing to positive change
- High standards and a desire to build upon their skill set
- Impartial decisions guided by reason and best use of time and resources

What is their current experience of the organisation?
See top Current Culture Values.

- A customer-centric approach, with focus on building a positive reputation in the marketplace
- People working together to meet performance and financial objectives
- Progress hindered by lack of clear direction and misalignment between groups
- Inefficient systems and processes impede efforts

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

See top Desired Culture Values.

- Focus on the future of the business, with emphasis on building a solid financial outlook
- Ongoing efforts to work together to meet customer needs
- High standards of conduct in an equitable environment, where people know they can count on one another
- Elevated standards and streamlined systems and processes
- Opportunities for staff to glean a deeper sense of purpose and connection from their work

Additional insights

1. The Culture Score reveals an organisation that is performing below the average for its Industry and Region, as well as below average for Culture Assessments in general. Factors contributing to this include a misalignment with chosen Desired Culture values, a Cultural Entropy score reflecting significant issues, and an over-emphasis on the Foundational aspects of the business. To raise the health of the organisation, consider how the organisation might clarify and communicate the purpose of the company, as well as how they might support employees in contributing to their fullest potential.

2. Note that Desired Culture values are distributed across all seven levels of the Barrett Model, illustrating a request for a more holistic and resilient approach to business. Participants seek new attention to Level 5 – Alignment and Level 7 – Contribution, in particular, around the values of 'fairness', 'trust' and 'long-term perspective'. How does the group define these values, and how would they like to bring them to life in the Example organisation? Note that 'fairness' and 'trust' are also Personal Values of this group, making these values especially important to deepen their sense of connection and engagement with their work. Invite employees to contribute their ideas for strengthening these values, possibly contributing to the deeper sense of 'employee fulfilment' they desire.

3. Review of Organisational Perspectives illustrates a significant call for the organisation to better support Employee Well-Being. For this group, this means ensuring equitable treatment but also providing opportunities for staff to develop as individuals and advance in their careers. In what ways might efforts aimed at supporting such initiatives also align with the long-term strategic aspirations of the business?

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?

6. There is clearly a large call for change. If you are looking to undergo a transformation project, to help everyone understand and support the change journey, 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 in the organisation need to understand and address both the tangible and intangible aspects of any changes planned? Balanced Action Plan

8. Consider what shared values your organisation wants to espouse for the long-term. Then, choose a set of core values, 3-4 maximum, as more will undermine your people's ability to connect to and live them. 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

Personal Values (PV)

7	Contribution
6	Collaboration
5	Alignment
4	Evolution
3	Performance
2	Relationships
1	Viability
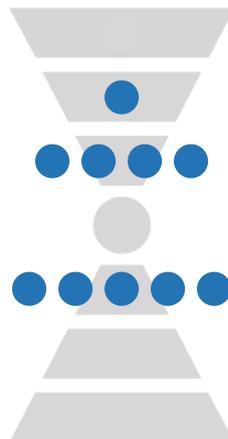
● - Positive Value
○ - Potentially Limiting Value

VALUE	VOTES	LEVEL
fairness	50	5
making a difference	42	6
logic	40	3
commitment	37	5
efficiency	35	3
cooperation	34	5
quality	34	3
experience	33	3
achievement	29	3
trust	29	5

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

- Efforts to establish mutual confidence and show support for others
- Dedication and a drive to be successful, while contributing to positive change
- High standards and a desire to build upon their skill set
- Impartial decisions guided by reason and best use of time and resources

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

Level 3 - Performance is about the accomplishment of objectives, leading to confidence, a sense of pride and self-worth.

Level 5 - Alignment is the embodiment of living and demonstrating one's true and genuine nature.

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

Current Culture Values (CC)

7 Contribution

6 Collaboration

5 Alignment

4 Evolution

3 Performance

2 Relationships

1 Viability
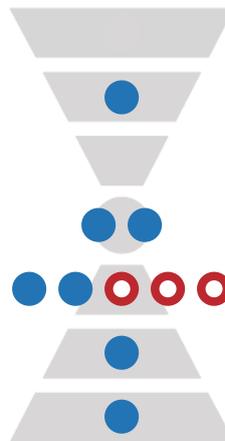
● - Positive Value
○ - Potentially Limiting Value

VALUE	VOTES	LEVEL
brand image	56	3
teamwork	42	4
customer satisfaction	34	2
results orientation	31	3
confusion (L)	29	3
bureaucracy (L)	27	3
customer collaboration	26	6
goals orientation	24	4
profit	24	1
silo mentality (L)	24	3

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

- A customer-centric approach, with focus on building a positive reputation in the marketplace
- People working together to meet performance and financial objectives
- Progress hindered by lack of clear direction and misalignment between groups
- Inefficient systems and processes impede efforts

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

Level 3 - Performance is about the accomplishment of objectives, leading to confidence, a sense of pride and self-worth.

Level 4 - Evolution reveals a willingness to adapt and be open to new perspectives.

Note that some of the focus at Level 3 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?

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 - Alignment is the embodiment of living and demonstrating one's true and genuine nature.

Level 7 - Contribution is the fulfilment of purpose in service of the greater good.

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 red circle.*

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 13% or lower is healthy. Note, report diagrams may show a variance in score due to rounding to the nearest whole number.*

❶ Viability	❷ Relationships	❸ Performance
cost reduction (20)	empire building (11)	confusion (29)
control (15)	internal competition (11)	bureaucracy (27)
short-term focus (11)	manipulation (9)	silo mentality (24)
caution (10)	blame (6)	hierarchy (17)
job insecurity (7)		long hours (12)
exploitation (5)		information hoarding (9)
		power (6)
6% of total votes	**4% of total votes**	**12% of total votes**

0%—13%	14%—19%	20%—28%	29%+

▲
22%

A Cultural Entropy score of 22% reflects 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 - Performance, indicating concerns affecting outcomes and operational efficiencies.

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

- Employees are lacking clarity around direction or expectations, and there is little coordination among internal groups
- Rigid internal structures, systems and processes undermine efficiency
- Participants are overworked and over-managed
- There is an over-emphasis on mitigating expense and a failure to plan ahead
- Decisions may be influenced by personal gain or a desire for dominance

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

Desired Culture Values (DC)

7 Contribution

6 Collaboration

5 Alignment

4 Evolution

3 Performance

2 Relationships

1 Viability

● - Positive Value
○ - Potentially Limiting Value

VALUE	VOTES	LEVEL
financial stability	42	1
long-term perspective	42	7
customer satisfaction	39	2
fairness	36	5
efficiency	34	3
teamwork	31	4
employee fulfilment	30	6
quality	30	3
professionalism	28	3
trust	28	5

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

- Focus on the future of the business, with emphasis on building a solid financial outlook
- Ongoing efforts to work together to meet customer needs
- High standards of conduct in an equitable environment, where people know they can count on one another
- Elevated standards and streamlined systems and processes
- Opportunities for staff to glean a deeper sense of purpose and connection from their work

Where do people want to see the 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 - Performance is about the accomplishment of objectives, leading to confidence, a sense of pride and self-worth.

Level 5 - Alignment is the embodiment of living and demonstrating one's true and genuine nature.

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

What types of values do they want to promote moving forward? – *Refers to the top Positive (P) or Potentially Limiting (L) values types favouring Individual (I), Relationship (R), or Societal (S) values - people focus – and Organisational (O) values – business focus. Consider the balance between people and business. Note shifts in focus from top Current to Desired Culture values, as well as where the emphasis of Personal Values naturally falls.*

Personal Values	Current Culture Values	Desired Culture Values
IRS (P)=6-3-1	IROS (P)=0-1-6-0	IROS (P)=0-3-7-0
IRS (L)=0-0-0	IROS (L)=0-0-3-0	IROS (L)=0-0-0-0

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.

Note that participants show a higher concentration of 'relationship' type values in their Personal Values than they currently experience in the workplace. How might placing more emphasis on interpersonal exchanges, as they are requesting, increase their sense of connection and engagement with their work?

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.*

Values		CC	DC	Jump
financial stability	➕	16	42	26
employee fulfilment	➕	5	30	25
long-term perspective	➕	19	42	23
efficiency	➕	13	34	21
fairness	➕	17	36	19
trust	➕	9	28	19
personal growth	⬆	5	24	19
positive attitude	⬆	11	27	16
leading by example	⬆	9	25	16
professional growth	⬆	6	22	16

✔	**Existing** In CC and DC now Call to strengthen	➕	**New Values** In Desired Culture	⬆	**Emerging** Not in 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 for development and career advancement

- An upbeat atmosphere where people demonstrate the behaviours they would like to see in others

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

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.

<div align="center">

teamwork

customer satisfaction

</div>

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:

<div align="center">

efficiency

fairness

quality

trust

</div>

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

Balance Index – *Here, votes for all values are grouped according to three major drivers:* *Foundation*, *composed of Levels 1, 2 and 3,* *Evolution* *at Level 4 concerning adaptability and employee participation, and* *Purpose*, *made up of Levels 5, 6 and 7.*

Personal Values **Current Culture** **Desired Culture**

Cultural Entropy®: 22%
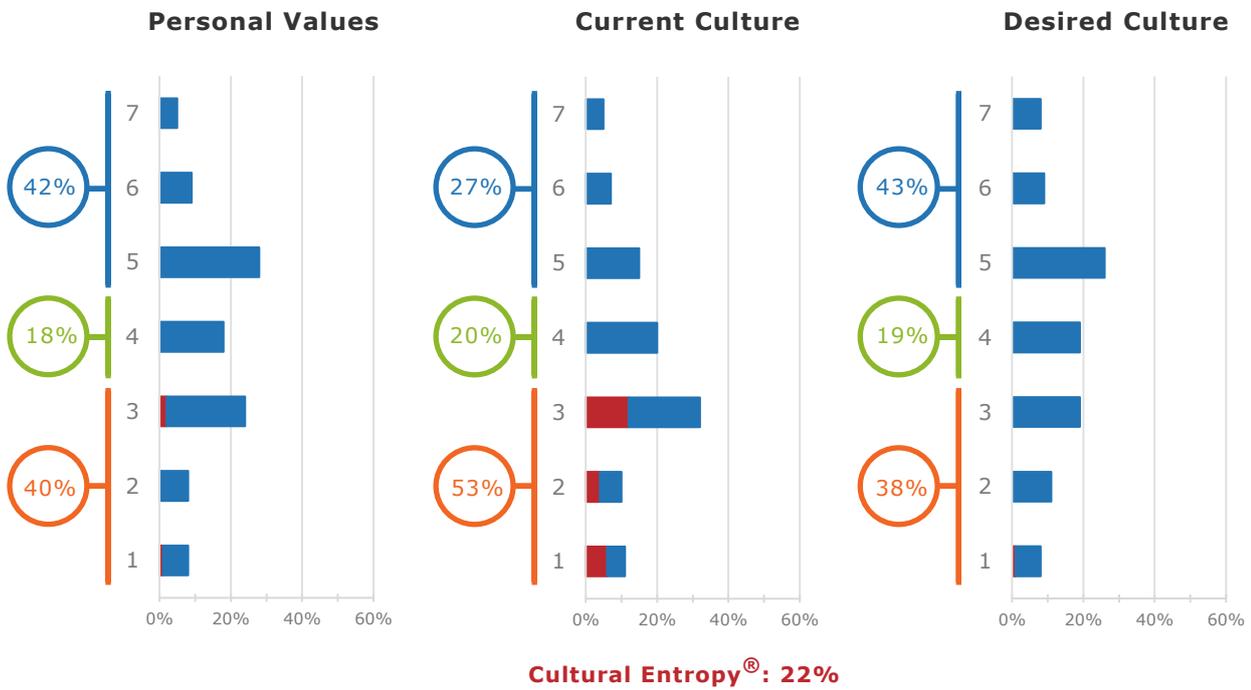
Misalignment between Current and Desired values distribution suggests a need to change direction. Participants seek greater emphasis on the areas pertaining to Purpose.

Organisational Perspectives – *The top Current and Desired values are displayed according to six key indicators that can help guide strategy for ongoing success.*

Process	People	Purpose

38%	11%	8%	23%	16%	4%
29%	8%	21%	20%	19%	2%
CC DC	CC DC	CC DC	CC DC	CC DC	CC DC
-9%	-3%	+13%	-3%	+3%	-1%
FINANCE & EFFECTIVENESS	**AGILITY & INNOVATION**	**EMPLOYEE WELL-BEING**	**TRUST & ENGAGEMENT**	**DIRECTION & COMMUNICATION**	**SUSTAINABILITY & SOCIETY**
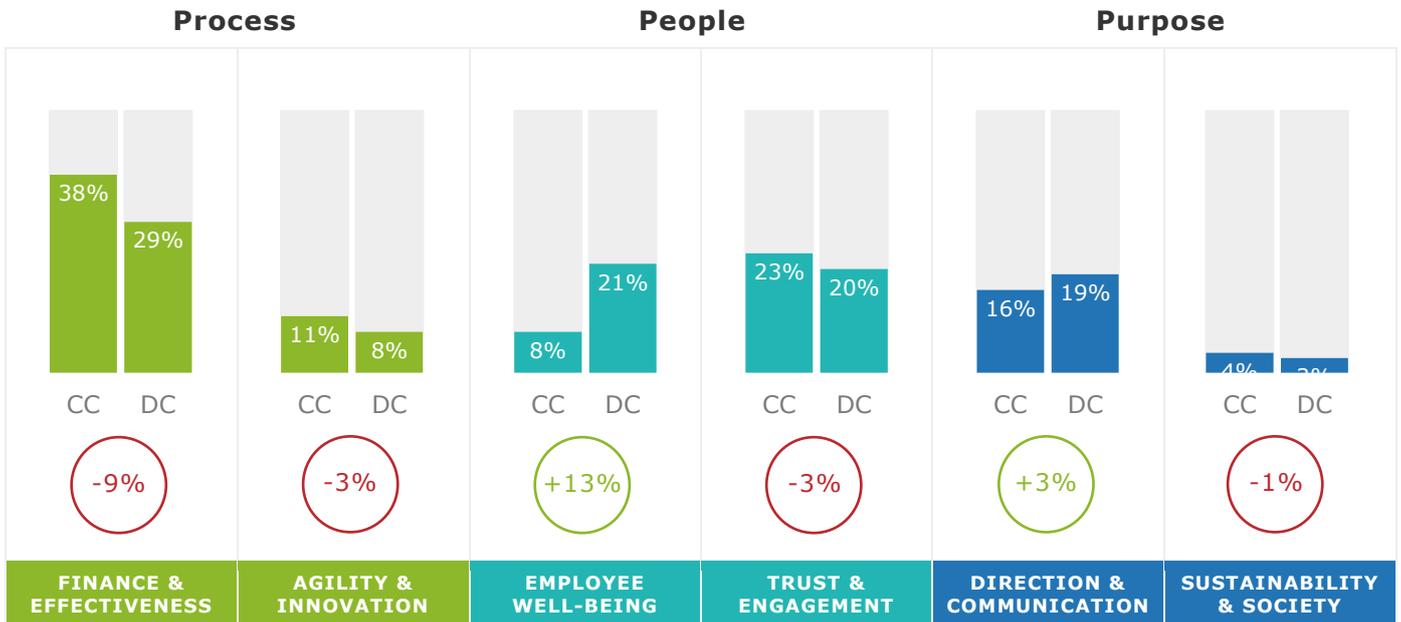
Current Culture:

Emphasis is placed primarily on factors related to Process, in particular Finance & Effectiveness.

Desired Culture:

While participants see the importance of continued focus on Finance & Effectiveness, the requested emphasis drops by 9% in this category going forward. The largest increase (13%) requested is around the aspect of People - Employee Well-Being, as well as some additional attention asked for in regard to Purpose - Direction & Communication.

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Organisational Perspectives – *Viewing the Current and Desired values according to their category reveals where people see a need for greater strategic focus.*

	Process		People		Purpose	
	FINANCE & EFFECTIVENESS	**AGILITY & INNOVATION**	**EMPLOYEE WELL-BEING**	**TRUST & ENGAGEMENT**	**DIRECTION & COMMUNICATION**	**SUSTAINABILITY & SOCIETY**
Desired Culture + Values Jumps	customer satisfaction quality professionalism financial stability efficiency		fairness employee fulfilment personal growth professional growth	teamwork trust positive attitude	long-term perspective leading by example	
Current Culture	brand image customer satisfaction results orientation bureaucracy customer collaboration goals orientation profit			teamwork silo mentality	confusion	
Cultural Entropy® 22%	6%	2%	1%	7%	6%	0%

The new call is to focus on values that help to establish an equitable and supportive working environment where people have opportunity for growth. Participants would also like to see efforts to plan for the future of the business.

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.

THE BARRETT MODEL

Contribution	7	**Living Purpose** Creating New Futures, Long-Term Perspective, Social Responsibility, Vision
Collaboration	6	**Cultivating Communities** Community Involvement, Mentoring/Coaching, Leadership Development, Partnership
Alignment	5	**Authentic Expression** Commitment, Honesty, Integrity, Positive Attitude, Transparency, Trust
Evolution	4	**Courageously Evolving** Adaptability, Diversity, Empowerment, Risk-Taking, Teamwork, Transformation
Performance	3	**Achieving Excellence** Best Practices, Competence, Productivity, Quality, Results Orientation
Relationships	2	**Building Relationships** Customer Satisfaction, Family, Friendship, Listening, Respect
Viability	1	**Ensuring Stability** Financial Security, Health, Profit, Safety

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Level 1: Viability represents the need for stability; be it financial, ensuring a sense of security, or the relevance of health and safety.

Level 2: Relationships reflects the attention to and importance of interpersonal relationships.

Level 3: Performance is about the accomplishment of objectives; leading to confidence, a sense of pride and self-worth.

Potentially limiting values are those words/behaviours that reflect possible elements of fear. They are located in Levels 1-3 only.

Level 4: Evolution reveals a willingness to adapt and be open to new perspectives.

Level 5: Alignment is the embodiment of living and demonstrating one's true and genuine nature.

Level 6: Collaboration represents higher order partnerships where alliances are formed, and people are positively impacted.

Level 7: Contribution is the fulfilment of purpose in service of the greater good.

ORGANISATIONAL PERSPECTIVES

While Barrett Analytics provide insight into the culture of an organisation from various viewpoints, the Organisational Perspectives reveal where the focus is with regard to its performance metrics, employee welfare, and impact to help guide its long-term success. These areas include:

PROCESS

Finance & Effectiveness

Finance & Effectiveness highlights fiscal health and performance using values that reflect organisational growth, key performance indicators, and customer satisfaction.

Agility & Innovation

Agility & Innovation reveals on an organisation's ability to adapt and to evolve its products, processes, and new ways of thinking.

PEOPLE

Trust & Engagement

Trust & Engagement relates to employees having opportunities to work together effectively, build mutual confidence, and develop a sense of ownership and empowerment.

Employee Well-Being

Employee Well-Being shows the extent to which people feel supported, equipped, and treated fairly within the organisation.

PURPOSE

Direction & Communication

Direction & Communication depicts the degree of clarity and focus about the organisation's vision and mission, as well as how information is communicated and shared.

Sustainability & Society

Sustainability & Society illustrates the organisation's efforts around its long-term impact and its contribution to the greater good.