

School 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 School 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 school?

Reference top Personal Values.

- Determination and dedication in their endeavours
- A perceptive, principled and upbeat outlook
- Working well with others and taking ownership of their actions
- Attentive, truthful and considerate interactions

What is their current experience of the school?

See top Current Culture Values.

- A dedicated approach with focus on fulfilling obligations
- Attention to working closely with parents and local society
- Group efforts, supporting one another
- Two-way exchanges, but at times being critical of others
- Maintaining order
- People fearing for their jobs

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

See top Desired Culture Values.

- Building a strong fiscal base and enhancing the capabilities of management
- Showing enthusiasm for education and striving to improve ways of working
- Dedicated and responsible people working together, with support from parents
- Focus on achieving the highest of standards and ensuring fiscal security

Additional insights

1. The School has an above average Culture Score, given the confidence that people have in the current direction and the relative balance in focus on both meeting basic needs and fulfilling its purpose. However, look at the two top potentially limiting values, 'blame' and 'job insecurity'. How do participants experience these currently and what might be done to address their concerns? To what degree is 'discipline' seen as potentially limiting for this school? Consider when an excess of 'discipline' may not be a good thing. However, given their request for this in the Desired Culture, it may be that here this is a positive attribute.
2. There is a strong call to focus on raising standards as demonstrated by the percentage shift in focus seen at Level 3 – Performance and confirmed by a similar shift in percentage focus in the Organisational Perspectives area of Finance & Effectiveness. While this request is not as clearly shown in the top values chosen, the values jumps help provide additional insights as to what might be missing for people here.
3. Look also at the increase in focus at Level 4 – Evolution and in the Organisational Perspectives area of Agility & Innovation. People appear to seek more focus on increasing participation from all stakeholders and focusing on ongoing development. Discuss with this group what changes might be put in place.

Suggestions for implementing change

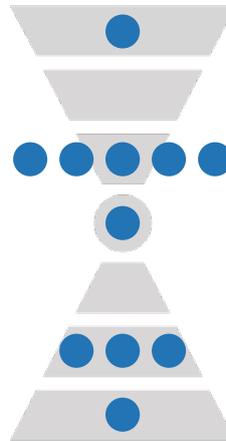
1. Develop a plan to deliver internal communication around these results. Remember to celebrate strengths, as well as looking at what can be improved.
2. Consider setting up focus groups to gain greater understanding around specific areas or issues and planning steps for improvement. An overview of steps 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 strategy aligns with the culture of the school 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 honour the call for more 'continuous improvement'? [Learning Levels Team Learning](#)
 - b) To what degree is the gap at Level 1 a missing need in the school? There is an underlying call for more focus here. Find out from participants what they believe the key priority to be.
 - c) People are asking to create a 'shared vision'. Consider how you might start to build understanding across the organisation. [Future Dialogue](#)
 - d) There is a call to focus on 'shared values'. How might you align behaviours with agreed core values? [Values in Action](#)
6. There is clearly some call for change. If you are planning to undergo a transformation project, 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 school need to understand and address both the tangible and intangible aspects of any changes planned? [Balanced Action Plan](#)
8. Consider what shared values your school 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 leaders are "living the values". In addition, determine what would undermine the espoused values. Make the values and behaviours pervasive throughout your school, 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: **accountability, commitment**. To what degree might these values support the long-term success of the school?

SECTION 1: PERSONAL VALUES

Understanding the people of your school

- 7 Contribution
- 6 Collaboration
- 5 Alignment
- 4 Evolution
- 3 Performance
- 2 Relationships
- 1 Viability

Personal Values (PV)



- - Positive Value
- - Potentially Limiting Value

VALUE	VOTES	LEVEL
accountability	173	4
commitment	121	5
honesty	100	5
caring	86	2
positive attitude	82	5
self-discipline	79	1
respect	78	2
vision	68	7
cooperation	59	5
integrity	56	5
listening	56	2

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

- Determination and dedication in their endeavours
- A perceptive, principled and upbeat outlook
- Working well with others and taking ownership of their actions
- Attentive, truthful and considerate interactions

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

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.

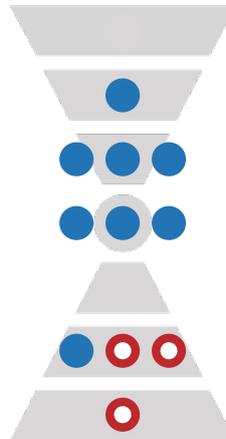
How might knowing your people better, help the school to frame its policies, practices, and procedures, and further engage stakeholders?

SECTION 2: CURRENT CULTURE VALUES

An overview of participants' current experience of the school

- 7 Contribution
- 6 Collaboration
- 5 Alignment
- 4 Evolution
- 3 Performance
- 2 Relationships
- 1 Viability

Current Culture Values (CC)



- - Positive Value
- - Potentially Limiting Value

VALUE	VOTES	LEVEL
accountability	105	4
commitment	87	5
discipline (L)	74	2
blame (L)	67	2
parent involvement	65	4
job insecurity (L)	56	1
cooperation	54	5
open communication	54	2
teamwork	53	4
community involvement	46	6
staff engagement	46	5

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

- A dedicated approach with focus on fulfilling obligations
- Attention to working closely with parents and local society
- Group efforts, supporting one another
- Two-way exchanges, but at times being critical of others
- Maintaining order
- People fearing for their jobs

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

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

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.

Note that some of this focus at Level 2 is potentially limiting and may be adversely affecting the school.

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

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

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

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 school?

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:

Discipline can be positive when it provides guidance to protect individuals from harm or to curb inappropriate behaviour. It becomes potentially limiting when it is used to disadvantage others or where it blocks spontaneity, innovation or creativity.

Blame implies an environment where people are faced with taking responsibility for other people's mistakes or problems that may or may not be a result of their actions. This undermines openness, trust and respect.

Job insecurity depicts an environment in which employees operate from a basis of fear of losing their employment. The presence of job insecurity can block new ideas and entrepreneurial spirit.

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.

1 Viability	2 Relationships	3 Performance
job insecurity (56)	discipline (74)	apathy/ boredom (36)
control (30)	blame (67)	confusion (32)
short-term focus (28)	dishonesty (37)	long hours (28)
caution (16)	parent interference (27)	power (13)
authoritarian (4)	manipulation (24)	hierarchy (10)
	bullying (19)	silos mentality (7)
		bureaucracy (6)
		information hoarding (4)
6% of total votes	11% of total votes	6% of total votes



A Cultural Entropy score of 23% 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 spread across Level 1 - Viability, Level 2 - Relationships and Level 3 - Performance, indicating concerns affecting financial health, interpersonal connections, and school success.

Note where negative focus is undermining positive efforts at Levels 1 and 2.

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

- A lack of clear, forward-thinking and truthful communication
- Participants who feel dis-engaged, disempowered and hindered by parental involvement
- People feeling over-stretched and afraid of losing their jobs
- A tendency to use others and find fault with them

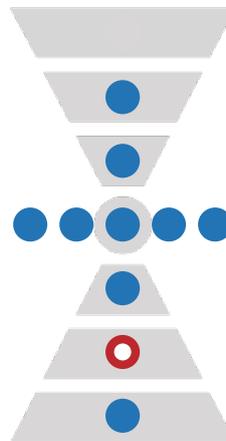
How do these situations show up in the dynamics of the culture? What behaviours do people experience and how does this impact them?

SECTION 3: DESIRED CULTURE VALUES

An overview of participants' desires for the future of the school

- 7 Contribution
- 6 Collaboration
- 5 Alignment
- 4 Evolution
- 3 Performance
- 2 Relationships
- 1 Viability

Desired Culture Values (DC)



- - Positive Value
- - Potentially Limiting Value

VALUE	VOTES	LEVEL
academic excellence	153	3
accountability	88	4
teamwork	80	4
parent involvement	74	4
discipline (L)	62	2
passion for learning	62	4
commitment	61	5
leadership development	55	6
financial stability	54	1
continuous improvement	53	4

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

- Building a strong fiscal base and enhancing the capabilities of management
- Showing enthusiasm for education and striving to improve ways of working
- Dedicated and responsible people working together, with support from parents
- Focus on achieving the highest of standards and ensuring fiscal security

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 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.

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)=6-5-0	IROS (P)=1-4-2-1	IROS (P)=2-2-5-0
IRS (L)=0-0-0	IROS (L)=0-2-1-0	IROS (L)=0-1-0-0

The change in top values types represents a call for the school to place more positive attention on personal qualities and the schools business needs.

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

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 school can build engagement, as well as provide more insight into the themes emerging from the Desired Culture.

Values		CC	DC	Jump
academic excellence	+	34	153	119
passion for learning	+	20	62	42
financial stability	+	18	54	36
being the best	↑	10	46	36
quality	↑	6	41	35
efficiency	↑	20	52	32
shared vision	↑	16	46	30
student achievement	↑	20	48	28
teamwork	✓	53	80	27
leadership development	+	31	55	24
making a difference	↑	24	48	24
shared values	↑	6	30	24

✓ **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:

- Additional calls to raise standards
- Working more proficiently to help students be successful
- Building a cohesive view of the future and a common set of principles to help promote positive change

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.

Top Personal and Top Current Culture Value Matches: 3

Indicates a highly aligned culture where people strongly connect with what is important to them in their experience at school. Their commitment is clear to see.

accountability
commitment
cooperation

Current/Desired Culture Matches: 5

Shows a strong degree of confidence in the current direction your school is taking, with some suggestions for change.

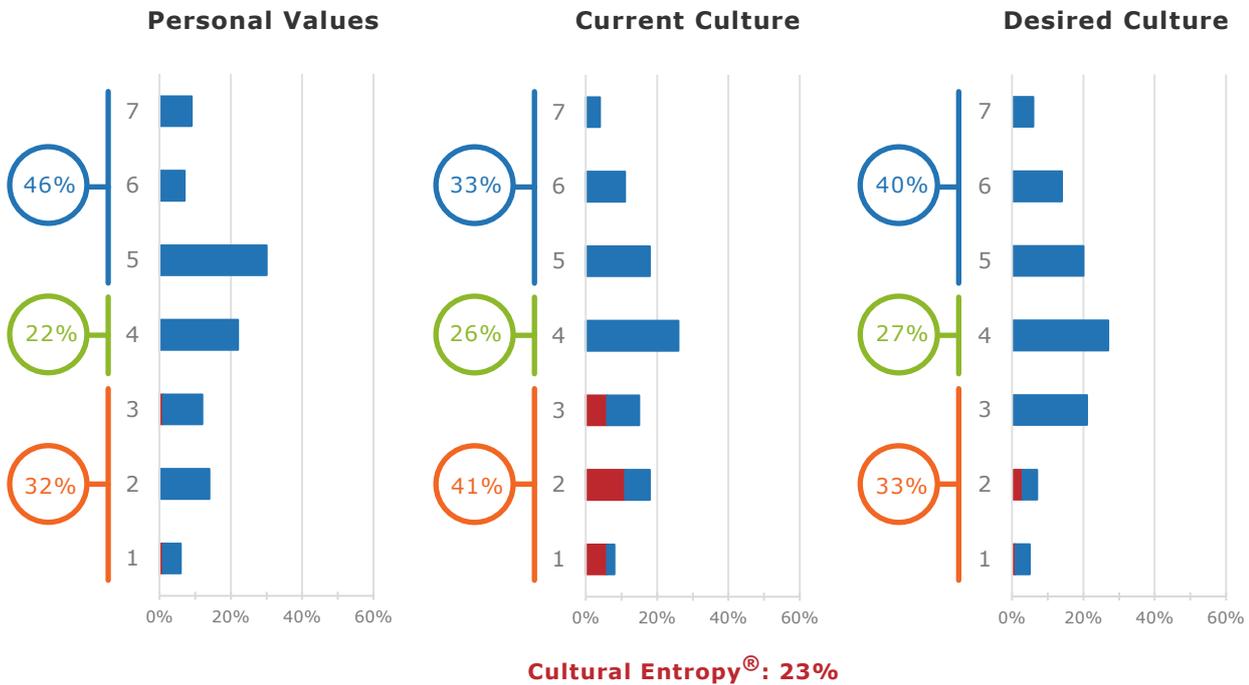
accountability
commitment
discipline
parent involvement
teamwork

Unsatisfied Personal Values requested in Desired Culture: 0

Denotes that people do not see any additional personal values which require more focus at the present time.

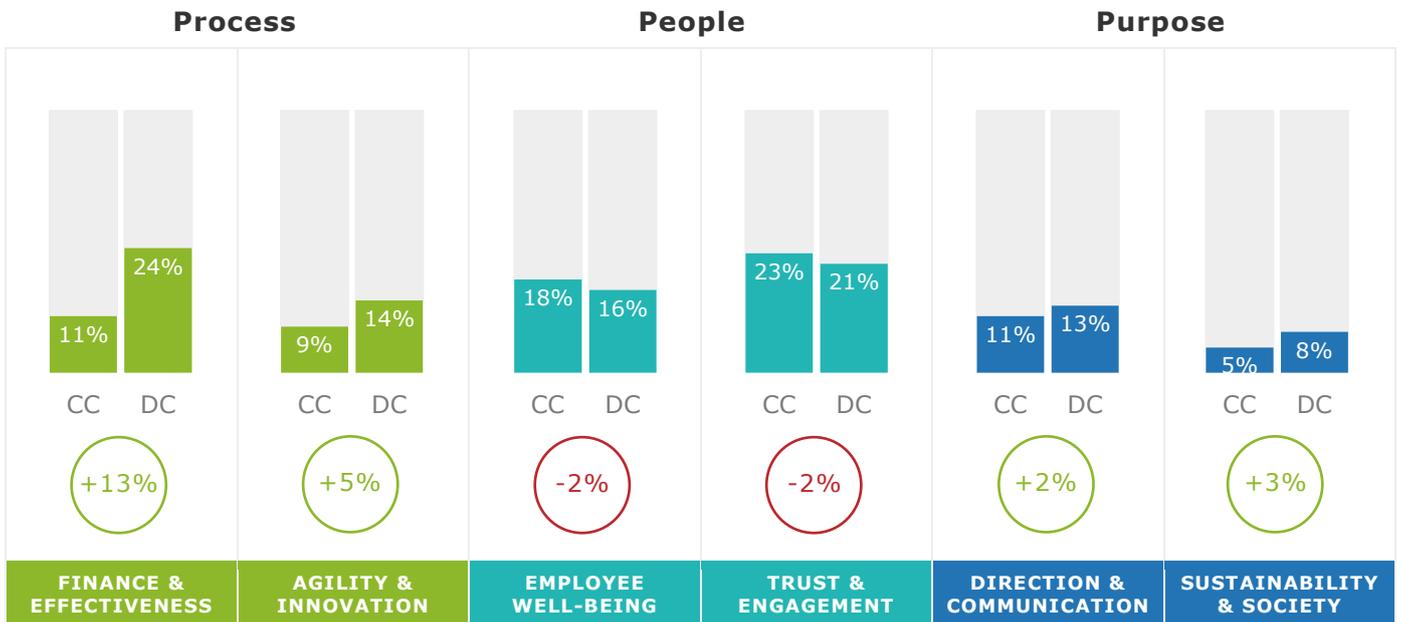
How confident are people that the group is on the right track? What areas appear relevant to focus upon next?

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 **Impact**, made up of Levels 5, 6 and 7.



A slight misalignment between Current and Desired values distribution suggests that a need to shift attention to other areas. Most new focus is requested at Level 3 – Performance, indicating a strong call to improve standards and work more effectively in support of students.

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



Current Culture:

Most emphasis is currently placed on People needs, helping them feel protected and involved.

Desired Culture:

This group wants to focus much more on Process, with particular attention given to Finance & Effectiveness.

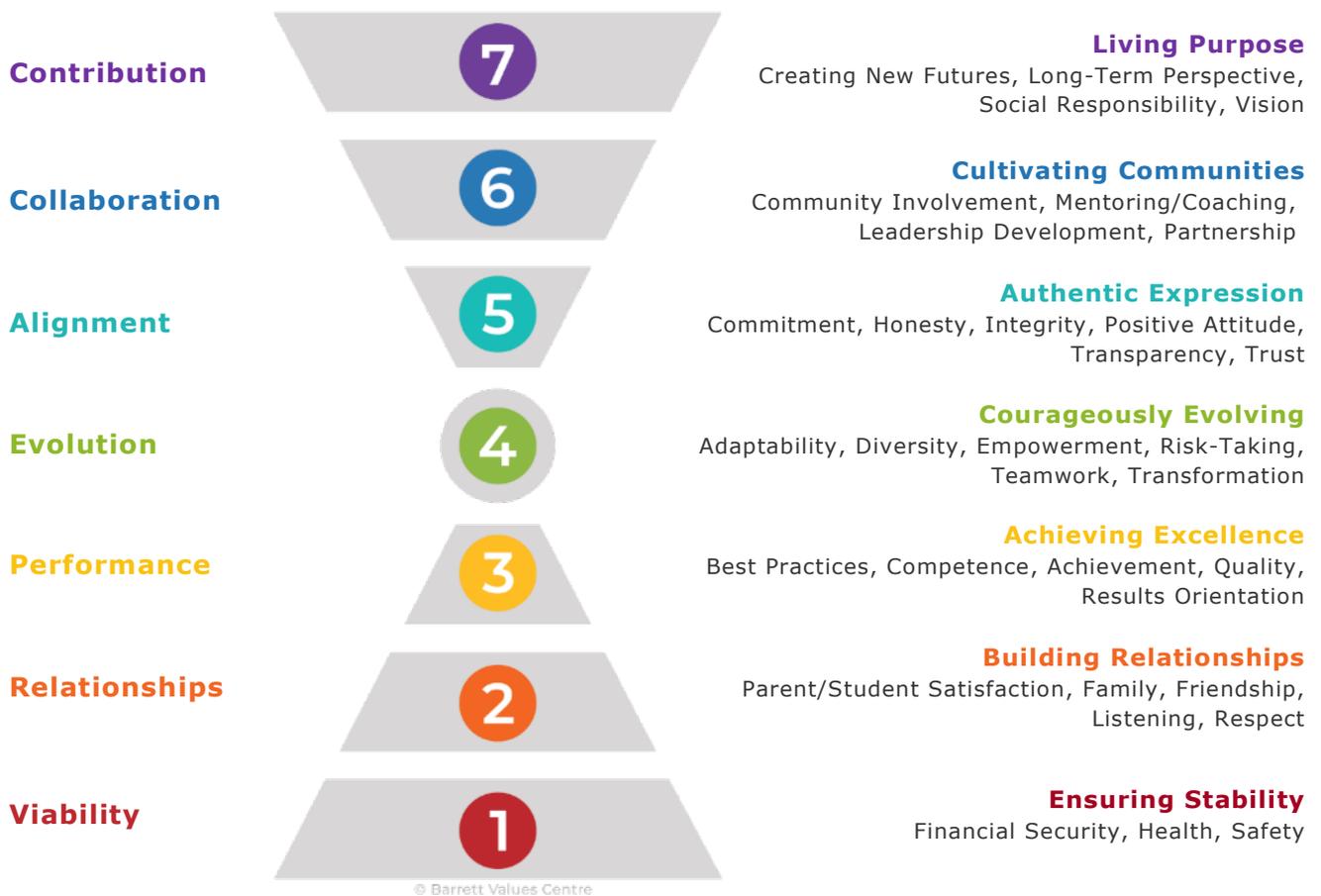
Organisational Perspectives – Viewing the Current and Desired values according to their category reveals where people see a need for greater strategic focus.

	Process		People		Purpose	
	FINANCE & EFFECTIVENESS	AGILITY & INNOVATION	EMPLOYEE WELL-BEING	TRUST & ENGAGEMENT	DIRECTION & COMMUNICATION	SUSTAINABILITY & SOCIETY
Desired Culture + Values Jumps	parent involvement academic excellence financial stability being the best quality efficiency student achievement	continuous improvement passion for learning	leadership development	accountability discipline commitment teamwork	shared vision shared values	making a difference
Current Culture	parent involvement		job insecurity	accountability commitment discipline blame cooperation teamwork staff engagement	open communication	community involvement
Cultural Entropy® 23%	1%	1%	5%	11%	4%	1%

In the area of Finance & Effectiveness, there are strong calls to raise standards. Notice that most problems occur in the area of Trust & Engagement, which paradoxically is also an area of strength. Explore the issues that may be undermining the School to better understand their impact.

Review the areas where the Cultural Entropy percentage is highest, to see what may be undermining the school's ability to utilize its full potential. Look at where change is requested and review the strategic plans. 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



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, stakeholder 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 parent/student 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.