



# **Culture Values Assessment**

## **Case Study 1 Elementary School - Parents**

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## EXPLANATION OF MODELS

The School Culture Assessment is a simple but effective means of measuring and mapping parents' and staffs' perception of the school culture. It provides a comprehensive diagnostic of the current culture and a detailed understanding of the desired culture by examining parents' and staffs' perceptions of the school's current values, what they consider to be desired values and their personal values. The results provide three perspectives:

- Human Perspective,
- Organizational Development Perspective, and
- Business Perspective

The Human Perspective and Organizational Development Perspective are obtained by mapping employees' personal values against the model of the Seven Levels of Personal Consciousness, and their perception of the current culture's values and desired culture's values against the Seven Levels of Organizational Consciousness.

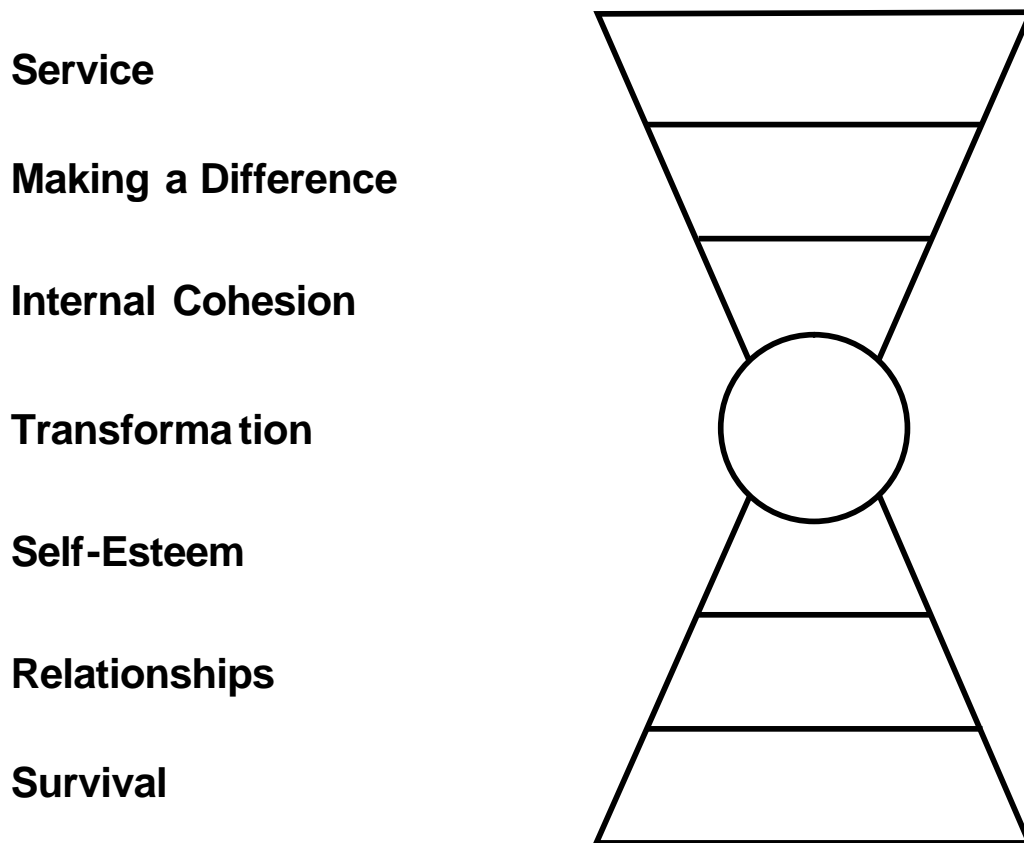
The model of the Seven Levels of Personal and School Organizational was created by Richard Barrett and is described in his book "*Liberating the Corporate Soul: Building a Visionary Organization*." It represents an extension of the work of Abraham Maslow. The fundamental basis of the Seven Levels of Organizational Consciousness is that all organizations and group structures are comprised of individuals, and act as living entities with similar motivations to those of individuals.

The Business Perspective is obtained by mapping the organization's current culture values and desired culture values against the Business Needs Scorecard. The model of the Business Needs Scorecard was created by Richard Barrett and is described in his aforementioned book. In the School Culture Assessment, it is used as a diagnostic tool to identify where the organization is currently focusing its energies, and where the people would like the organization to focus.

The six categories of the Business Needs Scorecard are:

- Finance – Economic Health, Financial Growth
- Fitness – Systems and Processes
- Client/Parent Relations – Customer/Parent Satisfaction and Strategic Alliances
- Evolution – Research and Development, New Products and Services
- Culture – Employee Fulfillment and Human Resources
- Societal Contribution - Social and/or Environmental Responsibility

## THE SEVEN LEVELS OF CONSCIOUSNESS



### Distribution of Consciousness

Individuals and organizations 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. Many organizations tend to be focused in the first three levels of consciousness – Level 1: survival and growth, Level 2: customer/parent satisfaction, and Level 3: productivity, efficiency and quality. The most successful organizations are distributed across the full spectrum of consciousness. They give emphasis to the top four levels of consciousness as well as the bottom three – Level 4: learning and innovation leading to continuous renewal, Level 5: internal cohesion, Level 6: employee fulfillment, customer/parent collaboration, and Level 7: ethics and social responsibility.

## SEVEN LEVELS OF PERSONAL CONSCIOUSNESS

**Level 1: Survival** – This level focuses on matters to do with physical survival. It includes values such as financial stability, wealth, safety, self-discipline and health. The potentially limiting aspects of this level are generated from fears around survival. Limiting values include greed, control and caution.

**Level 2: Relationships** – This level concerns 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 result from fears around loss of control or regard. Limiting values include rivalry, intolerance and being liked.

**Level 3: Self-Esteem** – This level addresses an individual's need for recognition. It includes such values as being the best, ambition, professional growth and reward. The potentially limiting aspects of this level results from low self-esteem and being out of control. Potentially limiting values include status, arrogance and image.

- There are no potentially limiting values in levels 4 through 7.

**Level 4: Transformation** – The focus at this level is on self-actualization and personal growth. It contains values such as courage, responsibility, continuous learning and independence. This is the level where people work to overcome their fears. It requires continuous questioning of beliefs and assumptions. It is also the level where they begin to find balance in their lives.

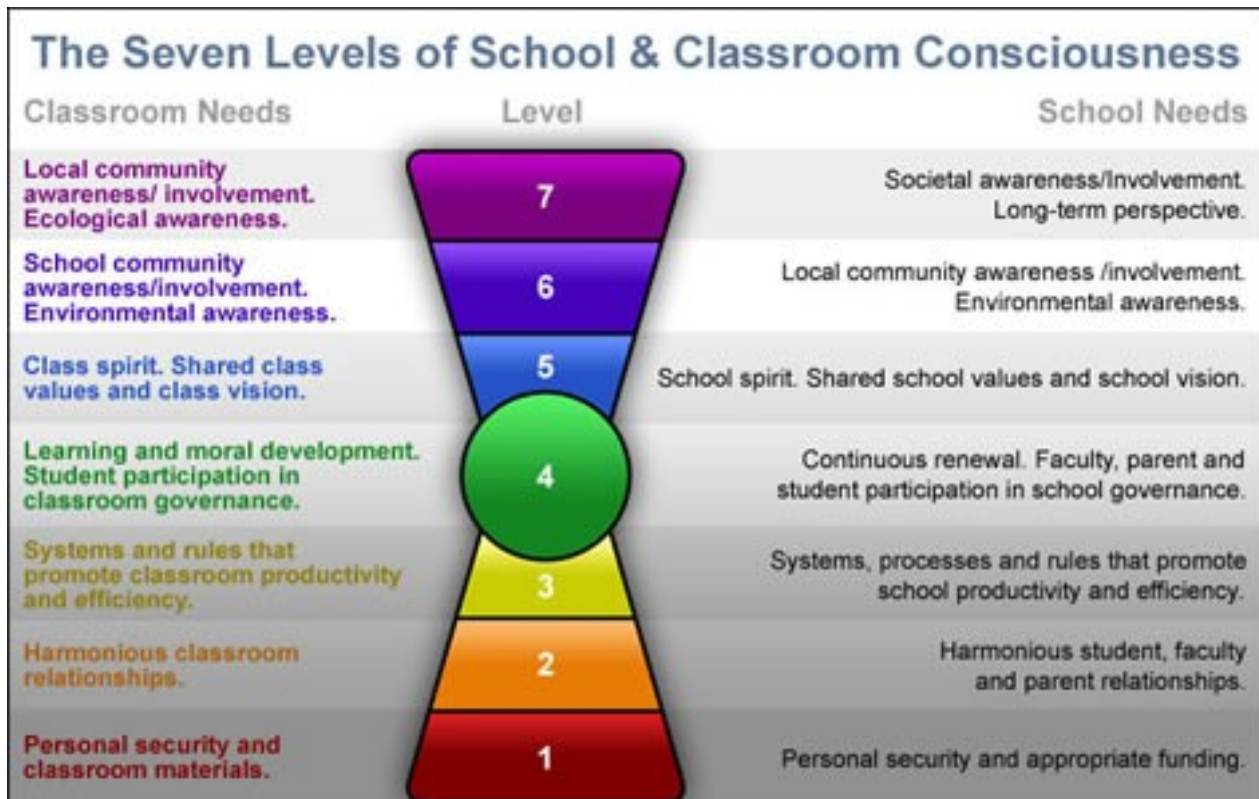
**Level 5: Internal Cohesion** - Level 5 concerns the individual's search for meaning. Individuals operating at this level no longer think in terms of a job or career, but in terms of a mission. This level contains values such as commitment, creativity, enthusiasm, humor/fun, generosity and honesty.

**Level 6: Making a Difference** - Level 6 focuses on making a difference in the world. It is also the level of active involvement in the local community. Individuals operating at this level honor intuition and contribution. They may be concerned about the environment or local issues. This level contains values such as counseling, community work, empathy and environmental awareness.

**Level 7: Service** - Level 7 reflects the highest order of internal and external connectedness. It focuses on service to others. Individuals operating at this level are at ease with uncertainty. They display wisdom, compassion and forgiveness. They are concerned about issues such as social justice, human rights and future generations.

## SEVEN LEVELS OF SCHOOL CONSCIOUSNESS

Schools have seven basic needs that reflect the seven levels of personal and group consciousness. These needs are summarized below. Schools grow and develop to the extent that they are able to master and integrate into their functioning the values and behaviors associated with each level of consciousness.



For more information go to <http://www.valuescentre.com/ed/index.htm>

Each level of School Consciousness focuses on different needs.

Levels 1 through 3 reflect the basic needs of any group of individuals – personal security and basic material needs (level 1), harmonious relationships (level 2), and organizational effectiveness (level 3).

Level 4 addresses the specific needs of the group with regard to adaptation to the changing external environment and empowerment of individuals in the internal environment.

Level 5 focuses on group cohesion through shared values. At level 6 the group becomes aware of community issues and the group as a whole participates and interacts with the community to make a difference. For schools the community is the local external community. At level 7 the

group becomes aware of societal or global issues and the group as a whole participates and interacts at local, national or societal level.

## **BUSINESS NEEDS SCORECARD**

The first three categories of the Business Need Scorecard cover the areas of business that an organization traditionally measures. They represent the “hard stuff” – the frontline needs. They are relatively easy to measure. They are called the tangibles. Every organization needs to pay attention to these areas in order to survive.

**Finance:** This category addresses financial and/or organizational growth indicators. Measurement focuses on items such as funding requirements and cash reserves.

**Client/Parent Relations:** The focus of this category is on relationships with outside stakeholders who are directly involved with the school – students and parents. Indicators in this category include customer/parent satisfaction, and customer/parent collaboration.

**Fitness:** This category focuses on internal systems and process issues such as quality, effectiveness, productivity, and efficiency.

**Evolution:** The focus of this category is on developing the future – new programs and processes that enhance.

**Culture:** This category looks at issues related to building a strong sense of organizational identity and internal community spirit. Performance indicators include factors such as employee fulfillment and leadership development.

**Societal Contribution :** This category concerns issues relative to social responsibilities.

# Key Findings

## Case Study 1 Elementary School - Parents

### I. THE HUMAN PERSPECTIVE

#### Values Plots Diagrams

**Top Values** - *Top values are those that have received the majority of the votes.*

- The most common values in the personal lives of the Case Study 1 Elementary School Parents are **family, honesty** and **caring**.
- The most common values within the Case Study 1 Elementary School Current Culture as seen by the Parents are **academic excellence, parent involvement** and **encouragement**.
- The Case Study 1 Elementary School Parents would like their organization to support the values of **academic excellence, character development** and **life skills**.

**Value Jumps** - *A value jump occurs when there are more votes for a value in the Desired Culture than in the Current Culture. Listed below are the top Desired Culture values that showed an increase in votes. Particular attention should be paid to those values that show a large jump between the Current and Desired Culture.*

- There are two values jumps. These are exactly the same as the Staff value jumps.

VALUE	CURRENT CULTURE VOTES	DESIRED CULTURE VOTES	JUMP
Character development	52	61	9
Continuous improvement	37	39	2

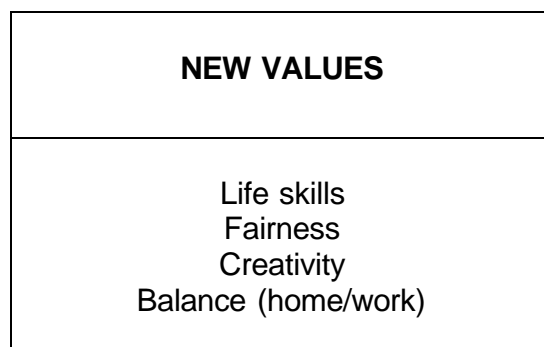
**Value Matches** - *Matching values indicate alignment. The greater the number of matching values, the greater the sense of motivation, commitment and authenticity there is within a group.*

- Personal Values and Current Culture: There is one matching value - **accountability**. This is the quality that the Case Study 1 Elementary School Parents can model.

- Current Culture and Desired Culture: There are seven matching values - **academic excellence, parent involvement, encouragement, character development, student achievement, commitment and continuous improvement.** These are the attributes that the Case Study 1 Elementary School Parents experience now and want to continue to see in the future. This shows that the school is, in strong part, on the right track in their opinion. In a highly aligned culture, one would expect to see six, seven or eight matching values.
- Personal Values and Desired Culture: There are no matching values.

**New Values** – *These are values in the Desired Culture Values list that are not in the Current Culture Values list. These are the values that the respondents would like to see implemented.*

- There are four new values in the values plot diagram.



**Potentially Limiting Values** - *Potentially limiting values are values that can cause frustration among employees and hinder the progress of the organization if they are not dealt with in a timely manner.*

- There are no potentially limiting values in the Current Culture. This shows that management is not fear-driven in how they make their decisions or how they motivate their people.
- There are no potentially limiting values in the Desired Culture.

**Entropy Report** – *This depicts the number of potentially limiting values per level in the Current Culture that were chosen by the survey participants. These represent all the potentially limiting values that were chosen and so may not be included in the top ten values on the Values Plot. Potentially limiting values are found only at levels 1, 2 and 3. This is a reflection of the degree of disorder within a system.*

<b>TOTAL NUMBER OF VOTES FOR POTENTIALLY LIMITING VALUES and PERCENTAGE OF TOTAL</b>	<b>Level 1</b>	<b>Level 2</b>	<b>Level 3</b>
92 out of 1450: 6% of total votes	49 out of 93: 3% of total votes	19 out of 151: 1% of total votes	24 out of 251: 2% of total votes
	control (20) caution (9) short-term focus (7) authoritarian (6) bullying (4) territorial behavior (3)	tradition (9) manipulation (5) blame (2) parent interference (2) lying (1)	bureaucracy (13) status (6) over-scheduled (4) cheating (1)

- This table shows that 6% of all votes were for potentially limiting values. This is a low and healthy level of entropy.

**Values Balance** - *There are four types of values: 1) "I" Individual - values that are expressed from within the person (honesty, integrity). 2) "R" Relationship - values that are demonstrated in terms of connecting with others (trust, accountability, teamwork). 3) "O" Organizational - values that focus on business issues (financial stability, productivity, customer satisfaction). 4) "S" Societal - values that focus on the common good outside of the business (community involvement, environmental protection, social justice). The Personal Values template does not contain any "O" Organizational values, so the index is IRS. The IROS index shows the distribution of these values types. This index reflects where the focus of an organization lies and its degree of balance.*

*A strong community with internal cohesion usually has at least three or four Individual values and three or four Relationship values in their top ten values.*

- Participants' Personal Values distribution of values types – IRS = 3-7-0. There are a significant number of "relationship" values in the list of top Personal Values. This shows that they are "people" persons.
- The employees' perception of the Current Culture – IROS (P) = 1-4-6-0.

- The employees' Desired Culture Values – IROS = 3-2-6-0.
- The balance of values types in the Desired Culture as compared to those in the Current Culture show an increase in “individual” values.

**Values Predominance and Gaps** - *A values gap represents a level without values. It means that this level is a) unconsciously taken care of, b) a blind spot, or c) represents the next area of growth for a group of individuals or an organization.*

- In the Personal Values, the positive values are located in four of the seven levels with predominance at level 2 - Relationships. There are no values in level 1 - Survival, level 3 - Self-esteem and level 6 - Making a Difference. Level 1 represents physical health, security and financial stability. Level 3 concerns personal self-esteem. Level 6 addresses involvement/concern for the local community.
- In the Current Culture, the positive values are distributed in five of the seven levels with predominance at level 4 - Transformation. There are no values in level 1 - Survival and level 7 - Service. Level 1 represents financial stability and the safety and security of students and staff. Level 7 addresses long-term perspectives, ethics, compassion for others and social responsibility.
- In the Desired Culture, the positive values are distributed in three of the seven levels with predominance at level 4 - Transformation and level 5 - Internal Cohesion. There are no values in level 1 - Survival, level 2 - Relationships, level 6 - Making a Difference and level 7 - Service.

## II. THE ORGANIZATIONAL DEVELOPMENT PERSPECTIVE

### Values Distribution Diagram

**Comparison of Personal and Current Culture Values:** The distribution of the Personal Values is focused at level 5 - Internal Cohesion (28%). Level 5 represents personal cohesion, maturity and/or a search for meaning.

There is some alignment between the Personal and the Current Culture Values of the organization:

- 43% of the employees' Personal Values are situated in the upper three levels of consciousness compared to 37% of their Current Culture values.
- 36% of their Personal Values are situated in the lower three levels of consciousness compared to 34% of their Current Culture values.

- 21% of their Personal Values are situated at level 4 compared to 29% of their Current Culture values.

**Comparison of Current and Desired Culture Values:** The distribution of values in the Current Culture is focused at level 4 - Transformation (29%). Level 4 represents the willingness of an organization to change and be open to input from employees.

There is some alignment between the Current Culture and the Desired Culture values:

- 37% of the Current Culture Values are situated in the upper three levels of consciousness, compared to 44% of their Desired Culture Values.
- 34% of the Current Culture Values are situated in the lower three levels of consciousness compared to 26% of their Desired Culture values.
- 29% of their Current Culture Values are situated at level 4 compared to 30% of their Desired Culture values.

**Comparison of Desired and Personal Values:** The distribution of values in the Desired Culture is focused at level 4 - Transformation (30%). Level 4 represents the willingness of an organization to change and be open to input from employees.

There is some alignment between the Desired Culture and the Personal values:

- 43% of the Personal Values are situated in the upper three levels of consciousness, compared to 44% of their Desired Culture Values.
- 36% of their Personal Values are situated in the lower three levels of consciousness, compared to 26% of their Desired Culture Values.
- 21% of their Personal Values are situated at level 4 compared to 30% of their Desired Culture values.

**Comparison of Positive Values:** The comparison of Current and Desired Culture positive values show an increase of 5% at level 7.

- At Level 7, they want to see a general increase in values.

### **III. THE BUSINESS PERSPECTIVE**

#### **Business Needs Scorecard Diagram**

- Based on the top eleven values in the Current Culture, the Case Study 1 Elementary School participants see their organization focused on four of the six categories – Fitness, Client Relations, Evolution and Culture. There are no top positive values in the categories of Finance and Societal Contribution.
- Based on the top eleven values in the Desired Culture, five of the six categories are covered – Fitness, Client Relations, Evolution, Culture and Societal Contribution. There are no top values in the category of Finance.
- There are no values in both the Current and Desired Culture for the category of Finance. What focus, if any, is on this area?
- The main differences between the Current Culture and the Desired Culture are the increased emphasis given to the categories of Evolution and Societal Contribution.

## V. EXECUTIVE SUMMARY

### CURRENT STRENGTHS OF CASE STUDY 1 ELEMENTARY SCHOOL

- The Personal Values of the Case Study 1 Elementary School Parents show they are **honest, caring, responsible and accountable**.
- They are focused on **family** and **friendship** and enjoy life (**humor/fun**).
- They are **compassionate**, **respectful** and **trustful**.
- In the parents' opinion Case Study 1 Elementary School fulfills many of their needs. They see the school culture focused on **academic and student achievement** as well as **parent involvement**. There is also a good degree of **character development**.
- The school is **student-centered** and students are taught in a climate of both **discipline** and **encouragement**.
- The staff of the school is seen as **accountable** and the parents enjoy the **open communication** with the school.
- The school is focused on **continuous improvement**.
- Despite these positive results, the people in Case Study 1 Elementary School want to see some improvements. They would like to see four new values. In particular, they want to see an increase in "individual" values.

### KEY ISSUES FOR CASE STUDY 1 ELEMENTARY SCHOOL

- Although the level of cultural entropy is very low, Case Study 1 Elementary School is hindered to some extent by the dynamics of **control, bureaucracy, tradition and caution**. The nexus of these four values together creates a climate where it might be difficult to express creativity.
- The Parents want to see more focus given to teaching their children **life skills**.
- They also want to more attention given to **fairness** and **creativity**.
- **Balance home/work** also appears to be an issue – is this a student issue?

- The values of **character development** and **continuous improvement** need to be strengthened.

## **CONCLUSION FOR CASE STUDY 1 ELEMENTARY SCHOOL**

- In the opinion of the parents the school is doing a good job with their children. They think the encouragement their children get is very important. They also are thankful for the commitment of the staff to their children. They see the school as student-centered. They are appreciative of the open communication. Despite all these positive areas, the parents want the school to give more focus to life skills, fairness, creativity and giving the children a more balanced life. They also want to see an increase in the attention given to character development and continuous improvement.
- Parents and Staff share 5 personal values – family, honesty, caring, responsibility and humor/fun.
- Parents and Staff share 7 current culture values for the school – academic excellence, parent involvement, character development, continuous improvement, student achievement, discipline and accountability.
- Parents also mentioned encouragement, commitment, student centered and open communication.
- Parents and Staff share 5 desired culture values – academic excellence, character development, continuous improvement, parent involvement and creativity.
- Parents also mentioned life skills, encouragement, fairness, balance (home/work), and commitment.

## RECOMMENDATIONS

- The cultural entropy as viewed by the parent is very low. Attention needs to be paid however, to the values of **control, caution, tradition and bureaucracy**. These are not serious issues at this time but do appear to be having an impact on **creativity** and the level of **continuous improvement**.
- Ascertain what the parents mean by the values of **fairness** and **life skills**. Determine their definitions and the behaviors they are expecting from the school.
- Hold discussions to learn what the people mean by the value of **creativity**. Determine what programs and efforts are needed to integrate this throughout the culture. Discuss whether a measurement of this value would support its implementation.
- Talk about **balance (home/work)** for children and what that would look like. Brainstorm ideas on how this can become a reality.
- Ask people how they or the organization can strengthen the values of **character development** and **continuous improvement**. Take action on these recommendations.
- In the Business Needs Scorecard, there are no values in both the Current and Desired Culture for the category of Finance. Discuss what the situation is currently for this area and what the next steps are needed to strengthen this category. Presumably the school is well funded and this is not an issue.

## VI. DATA REPORT

The Case Study 1 Elementary School report includes the following diagrams:

- **Values Assessment:** Shows the alignment of the top Personal, Current Culture and Desired Culture Values according to the Seven Levels of Consciousness.
- **Values Distribution Histogram:** Compares the distribution of all votes for Personal, Current Culture and Desired Culture values according to the Seven Levels of Consciousness.
- **Comparison of Positive Values:** Shows the percentage of votes for Personal, Current Culture and Desired Culture values according to the Seven Levels of Consciousness.
- **CTS Diagram:** Shows the percentage of votes for the top three levels of consciousness (Common Good), the level of Transformation and the bottom three levels (Self-interest).
- **Business Needs Scorecard Diagnostic (BNS):** Shows the distribution of the top Current and Desired Values according to the six categories of the Business Needs Scorecard. (Not all the listed top values translate into the scorecard. The scorecard does not include general values that apply to more than one category of the scorecard).
- **Values Plot Legend:**

P = Positive	I = Individual
L = Potentially Limiting (hollow dots)	R = Relationship
	O = Organizational
	S = Societal

### Survey Data:

- Case Study 1 Elementary School overall – 145 participants

**VALUES and THEIR ASSOCIATED LEVELS**  
**School Role (Parents) (145)**

Level	Personal Values	Current Culture Values	Desired Culture Values
7	compassion (R)		
6		student centered (O)	
5	honesty (I) humor/fun (I) trust (R)	academic excellence (O) commitment (I)	academic excellence (O) commitment (I) creativity (I) fairness (R)
4	accountability (R) responsibility (I)	accountability (R) character development (O) continuous improvement (O) encouragement (R) parent involvement (O)	balance (home/work) (I) character development (O) continuous improvement (O) encouragement (R) parent involvement (O)
3		student achievement (O)	life skills (O) student achievement (O)
2	caring (R) family (R) friendship (R) respect (R)	discipline (R) open communication (R)	
1			
	PL = 10-0 IRS (P) = 3-7-0 IRS (L) = 0-0-0	PL = 11-0 IROS (P) = 1-4-6-0 IROS (L) = 0-0-0-0	PL = 11-0 IROS (P) = 3-2-6-0 IROS (L) = 0-0-0-0

	Current Culture	Desired Culture
<b>Finance</b>		
<b>Fitness</b>	academic excellence student achievement	academic excellence student achievement
<b>Client Relations</b>	parent involvement student centered	parent involvement
<b>Evolution</b>	continuous improvement	continuous improvement creativity
<b>Culture</b>	encouragement character development open communication	character development encouragement balance (home/work)
<b>Societal Contribution</b>		fairness