

Individual Values Assessment

AN Other

TABLE OF CONTENTS

Section 1: Personal Values	3
Section 2: Current Culture Values	5
Section 3: Desired Culture Values	8
Seven Levels of Personal Consciousness	12
Seven Levels of Organisational Consciousness	14
The Business Needs Scorecard	16

This Individual Values Assessment provides you with an overview of what is important to you and helps identify your most important motivations. It also provides an overview of how you see your organisation operating now and what you believe is most important for the future. Key performance indicators, such as values alignment, outline the degree of connection you feel to the organisation and how confident you are in the current direction.

Additional recommended reading:

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

SECTION 1: PERSONAL VALUES

The values you selected to describe who you are.

Level	Personal Values (PV)	
7	●	
6	● ● ●	
5	● ●	
4	○ ●	
3		
2	● ●	
1		
IRS (P)=5-4-1 IRS (L)=0-0-0		
	adaptability	4(I)
	caring	2(R)
	coaching/ mentoring	6(R)
	fairness	5(R)
	honesty	5(I)
	humility	7(I)
	making a difference	6(S)
	open communication	2(R)
	risk-taking	4(I)
	well-being (physical/ emotional/ mental/ spiritual)	6(I)

P: ● - Positive Value
L: ○ - Potentially Limiting Value
I- Individual
R- Relationship
S- Societal

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

- Building relationships based on open, considerate and just actions
- Acting with modesty and flexibility
- Guiding others and seeking to promote change for the better
- A sense of adventure, while seeking to maintain a sense of balance across all aspects of your life

What would you consider to be your top value? How do you live this value through your behaviour?

What motivates you? – See concentration of top values.

Your Personal Values are located in five of the seven levels, with concentration at Level 6 - Making a Difference. This shows that you are focused on creating positive change through awareness and contribution, from a personal and community perspective.

What do the values gaps mean? - A values gap occurs where one or more of the seven levels have no top values. This can mean the levels are a) unconsciously taken care of, b) a blind spot, or c) the next area of growth.

There are no positive values in the following levels:

Level 1 - Survival deals with financial and physical well-being.

Level 3 - Self-esteem focuses on performing to a high standard.

Why do you think there are no positive values at these levels?

What is your main focus? – Refers to top values types. Each value is classified as Individual, Relationship or Societal (IRS). It is common to see a concentration of “individual” type personal values.

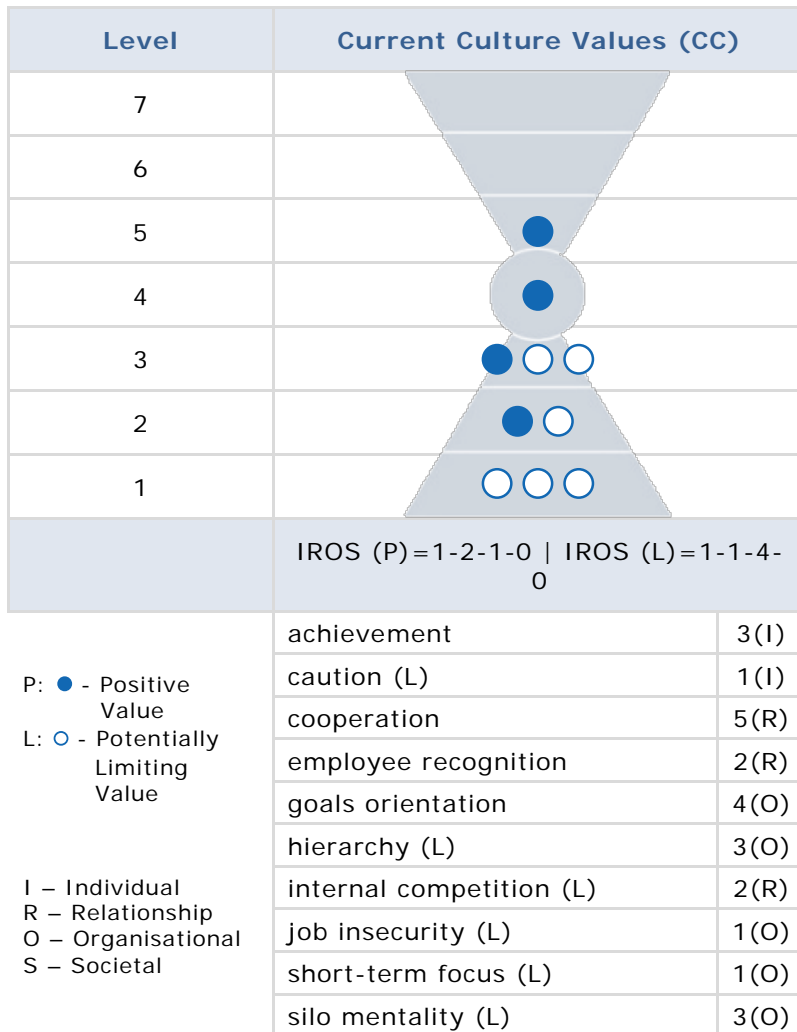
IRS: Of the top positive values chosen five are individual values, four are relationship values and one is a societal value. This indicates you see your strength in your personal contributions, although building connections with others is also important to you.

These are all positive values. You are not a fear driven person.

Learning about these aspects of your personal values, what clarity does this bring to your sense of self and your connections with others? Is there anything you feel compelled to explore further for your personal growth?

CURRENT CULTURE VALUES

The Current Culture Values reflect your perception of your organisation and the day-to-day work environment – both positive aspects of your experience and potential problem areas.



What is shaping your work experience? – Refer to top Current Culture values.

- Supportive and appreciative interactions with others
- Striving to meet business objectives and be successful
- Rigid internal structures and business divisions, with a tendency to work against one another
- A lack of forward planning and a hesitancy to embrace new ideas
- Employees fearing for their long-term employment

Where do you see most focus in the organisation? - *See concentration of top values.*

In the Current Culture, the top values are distributed in five of the seven levels, with concentration at Level 3 - Self-esteem and Level 1 - Survival, showing that much of the energy goes toward performance, systems and processes and financial matters and organisational growth.

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?

What is the balance of values types you see? *Consider the balance between people-focus (IRS) and business-focus (O – Organisational values).*

IROS: Of the top positive values chosen one is an individual value, two are relationship values, one is an organisational value and none are societal values. Six of the top values are potentially limiting: one is an individual value, one a relationship value and four are organisational values. Overall, you see most focus being placed on meeting business needs, though from a primarily negative 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 positive values in the following levels:

Level 1 - Survival focuses on financial matters and employee welfare.

Level 6 - Making a Difference promotes positive changes through internal connectedness and external alliances.

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

Based on your experience of the organisation, what do these gaps mean to you?

What potential issues do you see? – *Look at the top potentially limiting values, represented by a white dot. These values may cause frustration and hinder the progress of your organisation if they are not addressed.*

There are six potentially limiting values. This shows that fear is present in how decisions are made and/or how the people are motivated.

Caution is considered to be potentially limiting when it hinders risk-taking and prevents the full exploration of new ideas.

Hierarchy can become potentially limiting when position dictates the quality and degree of communication for all involved. Power and status can become the focal points. This situation can lead to empire building.

Internal competition is potentially limiting when it prevents open communication and the sharing of information, resources or ideas. The focus is on self-interest rather than the common good.

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.

Short-term focus is potentially limiting when people expend available energy on short-term issues at the expense of long-term solutions. It can be reflective of a reactive mind-set or scarcity consciousness.

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

What do you see as the causes and corrective actions behind these values?

What actions can you take to improve your own working situation?

How connected do you feel to your organisation? - *Matching values indicate alignment. The higher the number of matching Personal and Current Culture values, the greater the degree to which you are likely to feel a sense of alignment with your working environment.*

There are no matching values.

No values matches generally indicate that you are not aligned with the values of the Current Culture. This lack of alignment reduces commitment and performance. In a highly aligned culture, one would expect to see three or four matching values.

In a highly-aligned culture, one would expect to see three or four matching Personal and Current Culture values.

How comfortable do you feel to authentically be who you are in your work environment?

DESIRED CULTURE VALUES

An overview of the values and behaviours you selected for the future of the organisation.

Level	Desired Culture Values (DC)	
7		
6		
5		
4		
3		
2		
1		
	IROS (P)=2-4-3-1 IROS (L)=0-0-0-0	
	accountability	4(R)
	enthusiasm	5(I)
	innovation	4(O)
	leadership development	6(O)
	making a difference	6(S)
	open communication	2(R)
	shared vision	5(O)
	transparency	5(R)
	trust	5(R)
	well-being (physical/ emotional/ mental/ spiritual)	6(I)

P: ● - Positive Value
L: ○ - Potentially Limiting Value

I – Individual
R – Relationship
O – Organisational
S – Societal

What do you see as essential to reach the organisation's highest potential? – Refer to top Desired Culture values.

- An upbeat, open working environment where people take ownership of their actions
- Building strong leadership and a common understanding of the future of the organisation
- Exploring new approaches while seeking to promote positive change
- Employees having confidence in on another and being supported in their need to find holistic balance in their lives

Where do you want to see most focus in future? - See concentration of top values.

In the Desired Culture, the top values are distributed in four of the seven levels, with concentration at Level 5 - Internal Cohesion, indicating that you want to focus on building a sense of community spirit inside the organisation.

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

IROS: Of the top positive values chosen two are individual values, four are relationship values, three are organisational values and one is a societal value. This shows a good balance and a greater positive emphasis across all values types.

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

What new values do you see are important for the future? - See Desired Culture values that are not in the Current Culture. These are values that you see need more focus on, for your organisation to reach its highest potential.

There are ten new values in the values plot diagram:

accountability

enthusiasm

innovation

leadership development

making a difference

open communication

shared vision

transparency

trust

well-being (physical/ emotional/ mental/ spiritual)

Where and how would you like to experience these values in your organisation?

What behaviour shifts are required to bring these values into the organisation?

Which changes are you in a position to effect?

How do you think the rest of the people within the organisation view the culture?

How confident are you in the current direction of the organisation? – See matching values between Current and Desired Culture.

There are no matching values.

These would have been the attributes that you experience now and want to continue to support in the future.

The greater the number of matching values, the greater the degree to which you believe the organisation is on the right track. To what degree do you feel your organisation is moving in the right direction?

To what degree would the values which are important to you benefit the organisation in future? – See matching Personal and Desired values.

There are three matching values:

making a difference

open communication

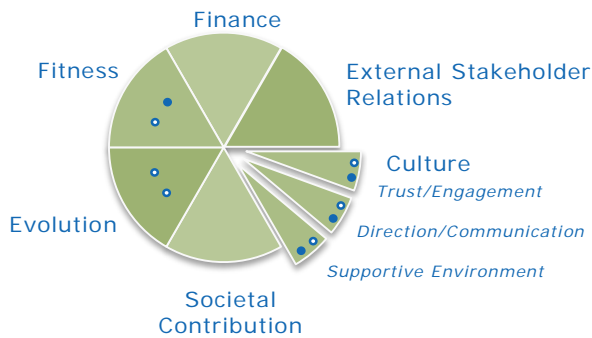
well-being (physical/ emotional/ mental/ spiritual)

These are values that, if chosen to be guiding principles of your organisation, can easily be brought to work by you since they are important in your daily life. They are important because you want to see more emphasis given to these values.

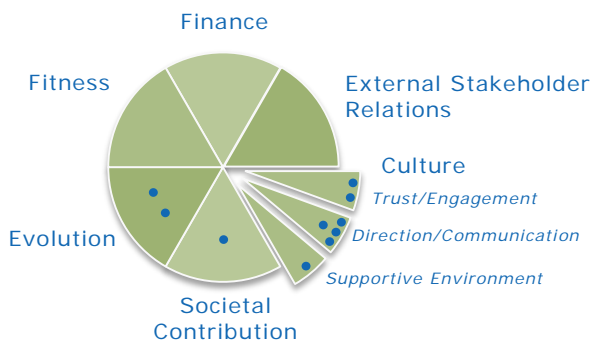
What steps can you take now to bring your Personal Values more fully into your work environment?

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. The six areas of the BNS are Finance, Fitness, External Stakeholder Relations, Evolution, Societal Contribution, and Culture. The area of Culture is broken down into three sub-sections: Trust/Engagement, Direction/Communication and Supportive Environment.

Current Culture Values



Desired Culture Values



	Current Culture	Desired Culture	
Finance			
Fitness	achievement internal competition (L)		
External Stakeholder Relations			
Evolution	caution (L) short-term focus (L)	innovation leadership development	
Culture	Trust/Engagement	cooperation silo mentality (L)	accountability trust
	Direction/Communication	goals orientation hierarchy (L)	enthusiasm open communication shared vision transparency
	Supportive Environment	employee recognition job insecurity (L)	well-being (physical/ emotional/ mental/ spiritual)
Societal Contribution		making a difference	

Current Culture:

You see problems affecting business performance and development, and how people interact and feel cared for by the business.

Desired Culture:

You want to see a more inclusive and progressive workplace, which fosters clear understanding and strives to support positive change.

Note the gaps in the areas of Finance and External Stakeholder Relations for both Current and Desired top values.

Are any gaps unconsciously addressed, blind spots, or next areas for development? What areas may require focus to promote the group's overall business success?

SEVEN LEVELS OF PERSONAL CONSCIOUSNESS



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 recognise 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



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.

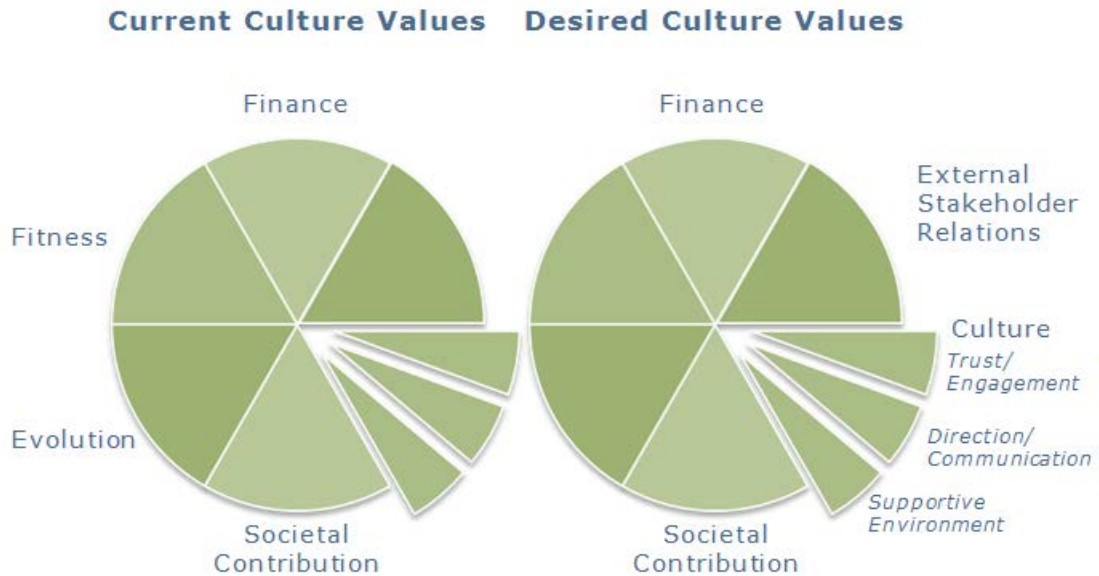
LEVEL 6: MAKING A DIFFERENCE

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.