

# School Values Assessment (SVA)

## Example

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To build a high performing, values-driven school that engenders high levels of employee and student 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 Values Assessment provides you with an overview of what is important to your people, how they see the school operating now and provides you with a roadmap for change. Key performance indicators such as values alignment and the Cultural Entropy score can help you measure the success of change initiatives, as you monitor progress and needs year by year.

Additional recommended reading:

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

## EXECUTIVE SUMMARY AND RECOMMENDATIONS

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

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

*Reference top Personal Values.*

- Determination and dedication in their endeavours
- A perceptive 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.*

- Dedication and ownership in their endeavours
- Working closely with parents and local society
- Working together and supporting one another
- Two-way exchanges, but at times can be 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

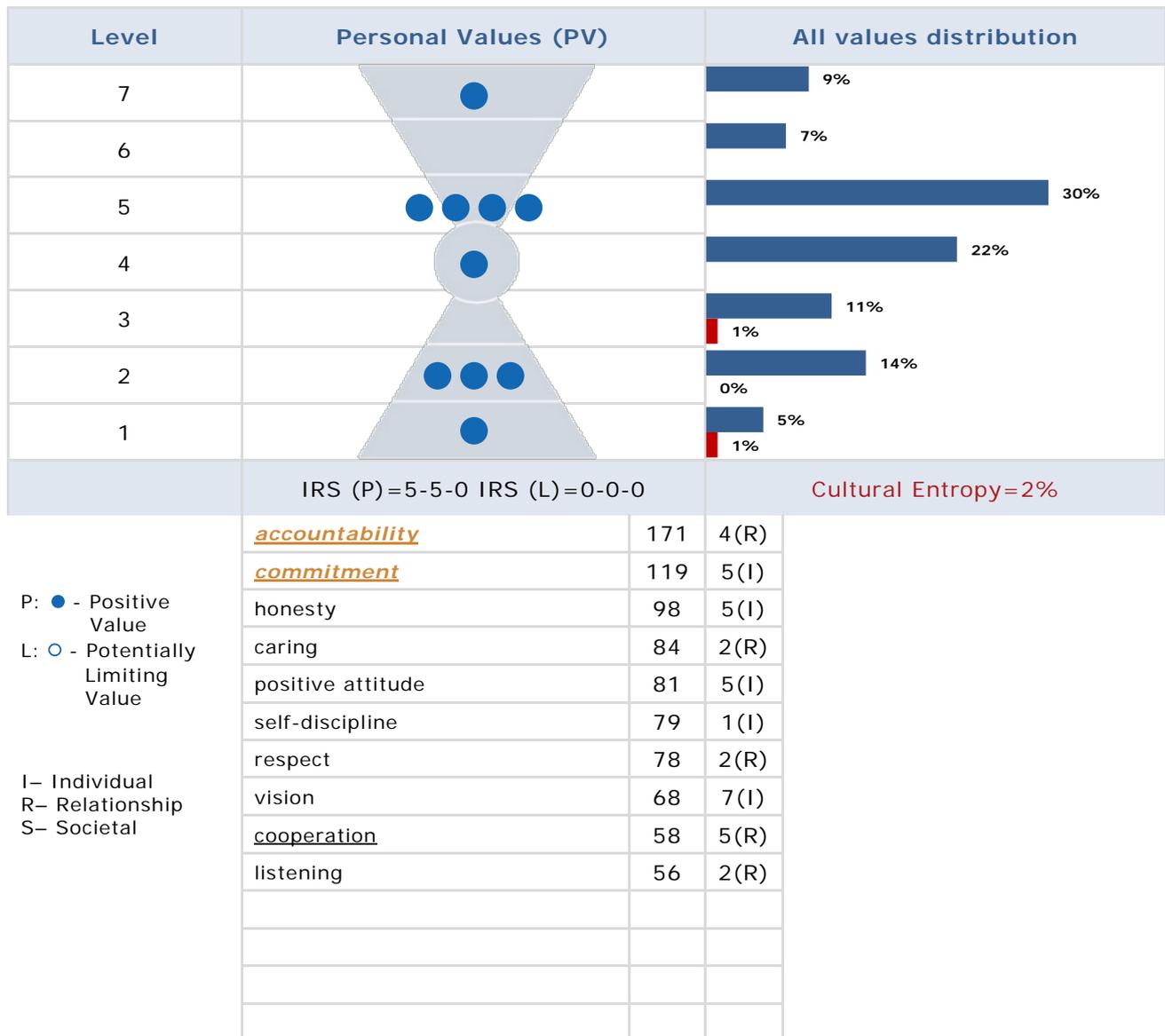
1. Look at the two top potentially limiting values of 'blame' and 'job insecurity'. How do participants experience these currently and what might be done to address their concerns?
2. The strong call is focus on addressing performance, systems and processes as demonstrated by the percentage shift in focus seen at Level 3 – Self-esteem and confirmed by a similar shift in percentage focus in the Business Need Scorecard (BNS) area of Fitness. While this request is not as clearly shown in the top values chosen, the new 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 – Transformation and in the BNS area of Evolution. 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 school's strategy aligns with the culture of the organization as seen in the results. [Align Strategy & Culture](#)
4. People seek more focus around ongoing development for leaders. 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) What steps can you take to honour the call for more focus on relationships across the group?
  - b) To what degree is the gap at Level 1 and the BNS area of Finance 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 school. [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. To see some examples of how assessments have been used successfully in another school, review the following case study: [Hookstone Chase CP School](#)
7. What help might the leaders of the school need to help understand and address both the tangible and intangible aspects of any changes planned? [Balanced Action Plan](#)
8. Consider what values your school wants to espouse for the long-term. Then, define a set of shared values, 3-4 maximum, as choosing more will undermine peoples' ability to connect to and demonstrate the chosen values. Define what each of these values specifically mean and what behaviours would be expected to support them. These behaviours can then be used for performance measurement regarding how well 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/ student 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



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

- Determination and dedication in their endeavours
- A perceptive 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 – Transformation** indicates a willingness to learn and develop.

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

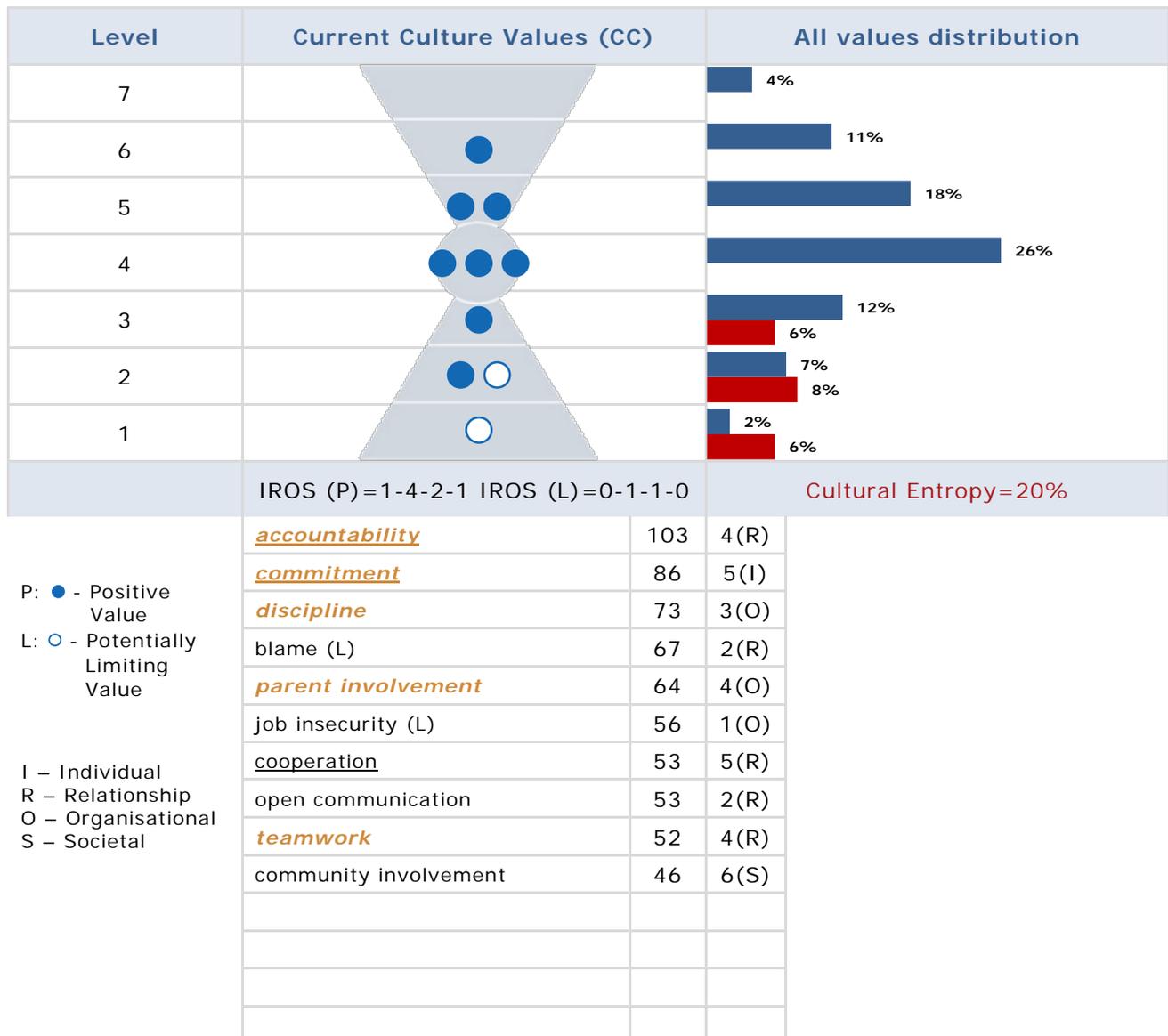
**What is their main focus?** – Refers to top values types favouring Individual, Relationship or Societal Values (IRS). Usually focus is on “Individual” type values.

The type of values selected shows most focus on their personal abilities and their connections with others.

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

## SECTION 2: CURRENT CULTURE VALUES

An overview of participants' current experience of the school



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

- Dedication and ownership in their endeavours
- Working closely with parents and local society
- Working together and supporting one another
- Two-way exchanges, but at times can be 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 4 - Transformation** represents an openness to change and be open to input.

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

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

The range of top values selected shows most emphasis is placed on interpersonal connections, though some relationships appear to be broken.

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

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

There are no top positive values in the following levels:

Level 1 - Survival focuses on financial matters, safety and organisational growth.

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

*What concerns, if any, do these gaps raise for you?*

*What do you feel is the next area of growth for your school?*

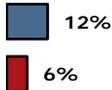
**What potential issues impact the group?** – Look at the top potentially limiting values represented by a white dot.

Consider the causes and corrective actions behind these values:

**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. A Cultural Entropy score of 10% or lower is healthy. Note, report diagrams may show a variance in score due to rounding to the nearest whole number.*

LEVEL	Potentially Limiting Values (votes)	Cultural Entropy %
<b>3</b> 	apathy/ boredom (36) confusion (32) long hours (28) power (13) hierarchy (10) silo mentality (7) bureaucracy (6) information hoarding (4)	6% of total votes
<b>2</b> 	blame (67) dishonesty (37) parent interference (27) manipulation (24) bullying (19)	8% of total votes
<b>1</b> 	job insecurity (56) control (30) short-term focus (28) caution (16) authoritarian (4)	6% of total votes

**A Cultural Entropy score of 20% reflects issues requiring cultural or structural adjustment.**

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

The Cultural Entropy percentage is spread across Level 1 - Survival, Level 2 - Relationship and Level 3 - Self-esteem, indicating concerns affecting financial matters, organisational growth, interpersonal connections and performance.

Note where negative focus is undermining positive efforts.

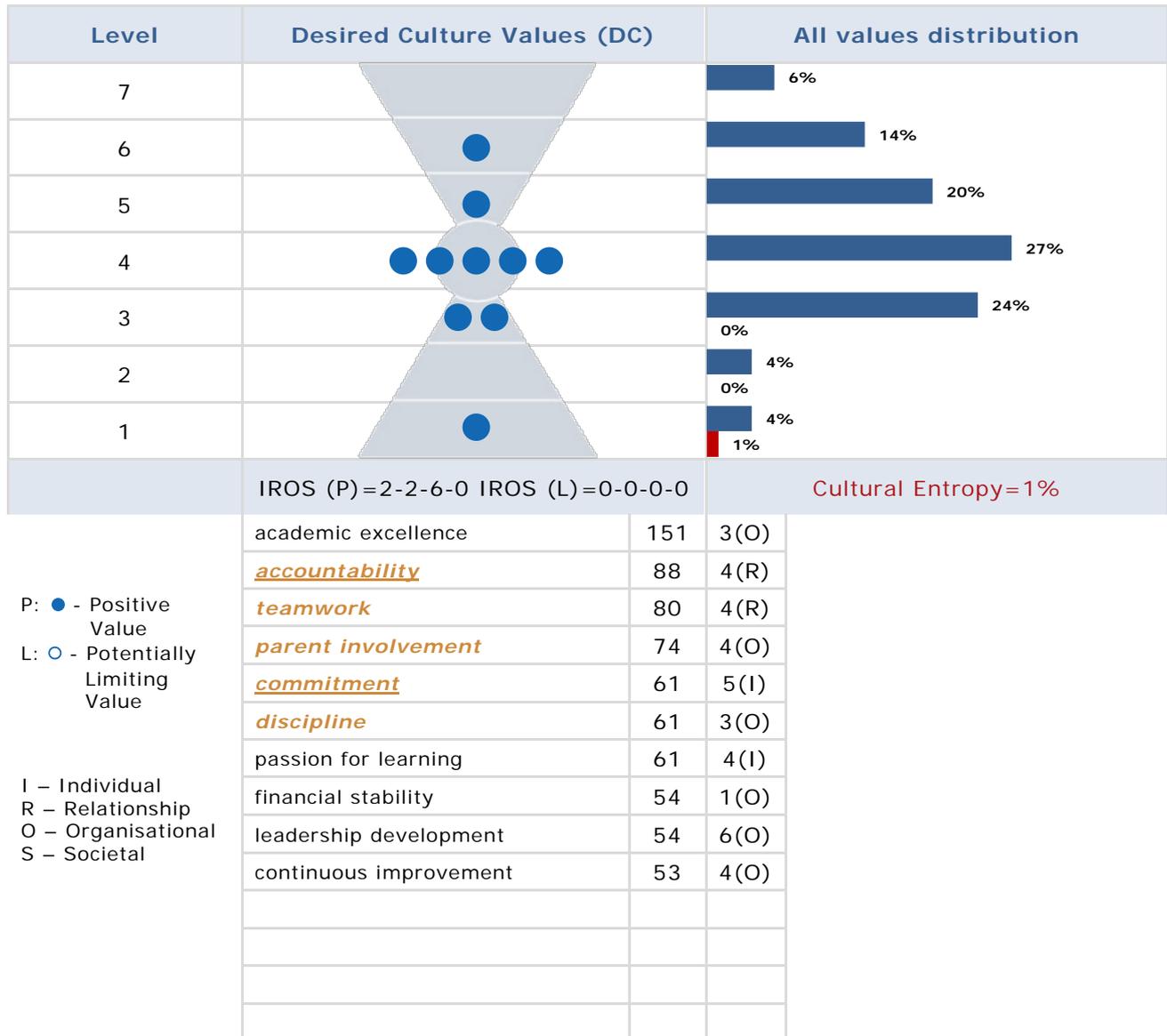
**What are the key concerns for the group?** – *See potentially limiting values in table above.*

- A lack of clear, forward-thinking and truthful communication
- Participants who feel dis-engaged 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
- This group lacks empowerment

*How do these situations show up in the school? 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



**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 most focus in future?** - *See concentration of top values and full values distribution by level.*

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

**Level 3 - Self-esteem** concerning systems and processes, operational effectiveness and best practice.

**Level 4 - Transformation** representing the willingness of a school to change and be open to input.

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

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

This spread of values represents a call for the school to place more positive attention on personal qualities and on meeting 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.*

Value	Level (IROS)	Current Culture Votes	Desired Culture Votes	Jump
<b>academic excellence</b>	<b>3 (O)</b>	<b>34</b>	<b>151</b>	<b>117</b>
<b>passion for learning</b>	<b>4 (I)</b>	<b>20</b>	<b>61</b>	<b>41</b>
<b>financial stability</b>	<b>1 (O)</b>	<b>18</b>	<b>54</b>	<b>36</b>
quality	3 (O)	6	41	35
being the best	3 (O)	10	44	34
efficiency	3 (O)	20	52	32
shared vision	5 (O)	16	46	30
<b>teamwork</b>	<b>4 (R)</b>	<b>52</b>	<b>80</b>	<b>28</b>
student achievement	3 (O)	20	48	28
shared values	5 (O)	6	30	24

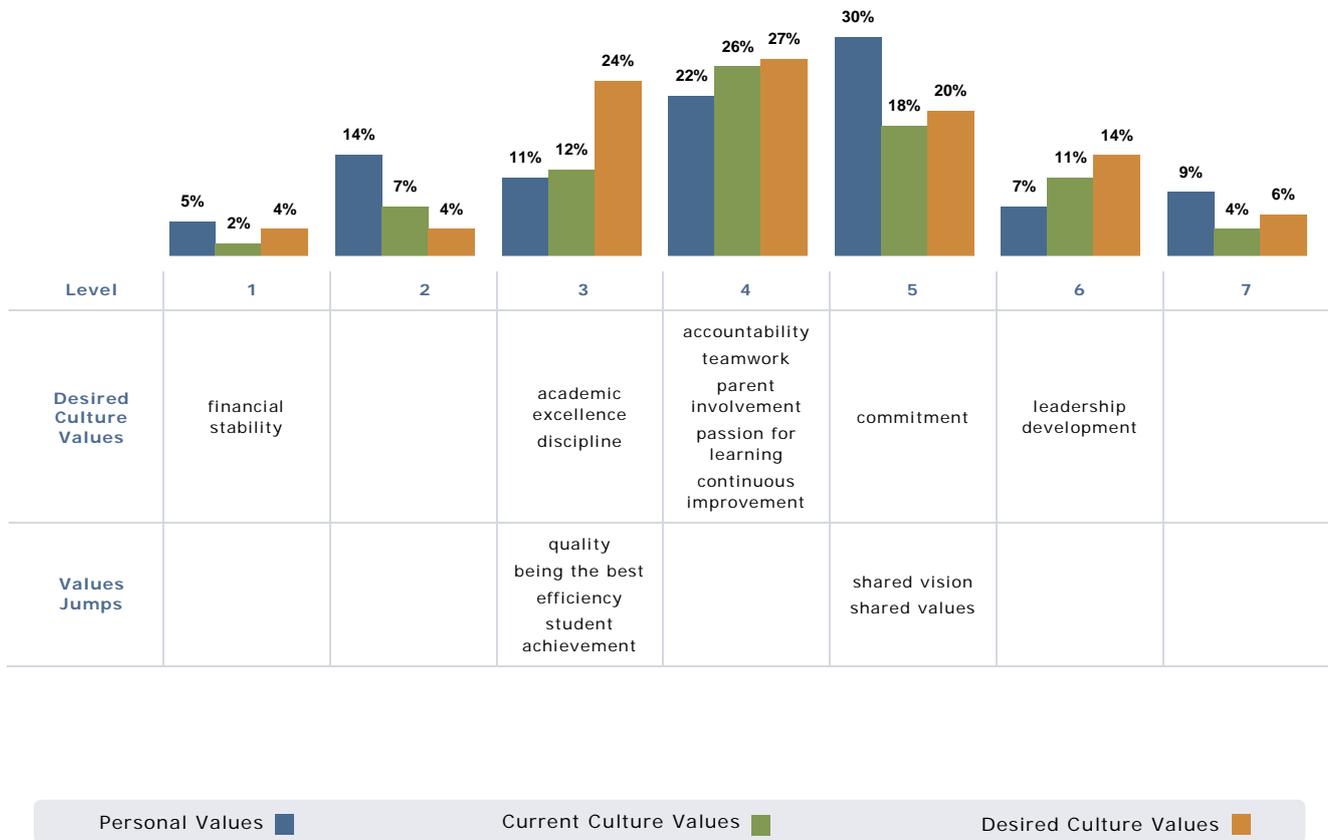
***Values in bold are top values in the Desired Culture.***

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

- 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

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

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



Most new focus is requested at Level 3 – Self-esteem, indicating a strong call to improve standards and work more effectively in support of students.

*What do you see as the long-term challenges for the group, and how might the values included in this table help address these challenges?*

## SECTION 4: OTHER INDICES

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

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

### Personal/Current Culture Matches: 3

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

### Current/Desired Culture Matches: 5

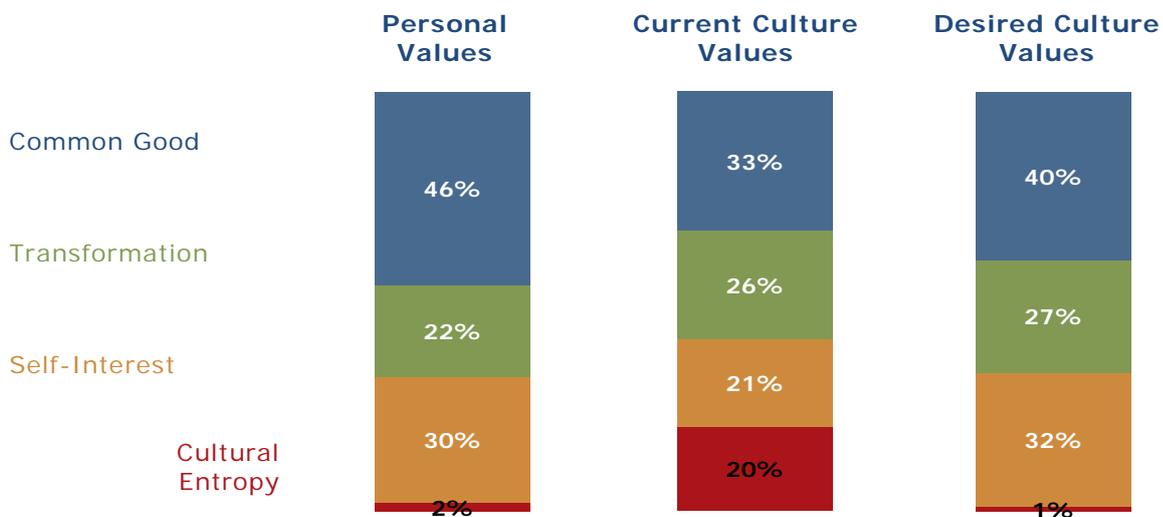
Shows a strong degree of confidence in the current direction of your school, with some suggestions for change.

### 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?*

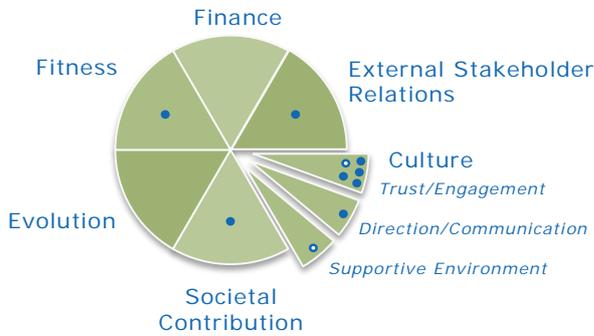
**CTS Values Distribution** – Here, votes for all values are grouped according to three major drivers: Self-Interest, composed of Levels 1, 2 and 3, Transformation at Level 4 concerning adaptability and stakeholder participation, and the Common Good, made up of Levels 5, 6 and 7.



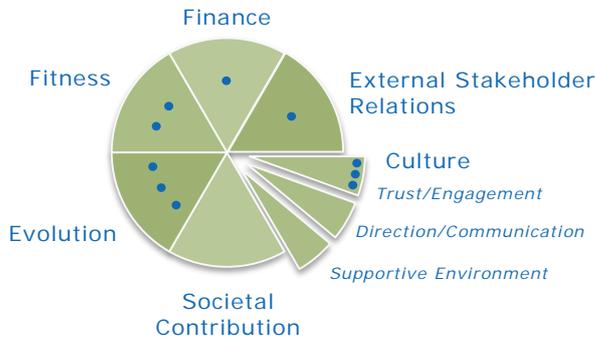
A slight misalignment between Current and Desired values distribution suggests that a need to shift attention to other areas. Most new focus is requested across the levels of Self-Interest, indicating a need to get back to basics and do things well.

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

**Current Culture Values**



**Desired Culture Values**



	Current Culture	Desired Culture
<b>Finance</b>		financial stability
<b>Fitness</b>	discipline	academic excellence discipline
<b>External Stakeholder Relations</b>	parent involvement	parent involvement
<b>Evolution</b>		passion for learning leadership development continuous improvement
<b>Culture</b>	<b>Trust/Engagement</b>	accountability commitment blame (L) cooperation teamwork
	<b>Direction/Communication</b>	open communication
	<b>Supportive Environment</b>	job insecurity (L)
	<b>Societal Contribution</b>	community involvement

**Current Culture:**

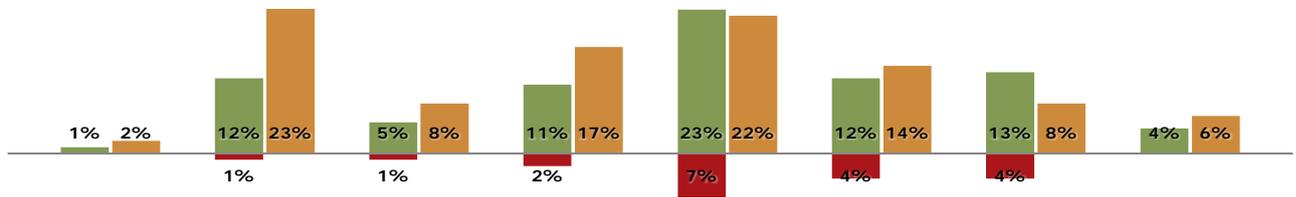
People see issues impacting on how people work together and feel supported.

**Desired Culture:**

This group wants to improve performance, take a more progressive approach and build a strong fiscal base from which to operate.

*What areas may require additional focus to promote the group's overall success?*

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



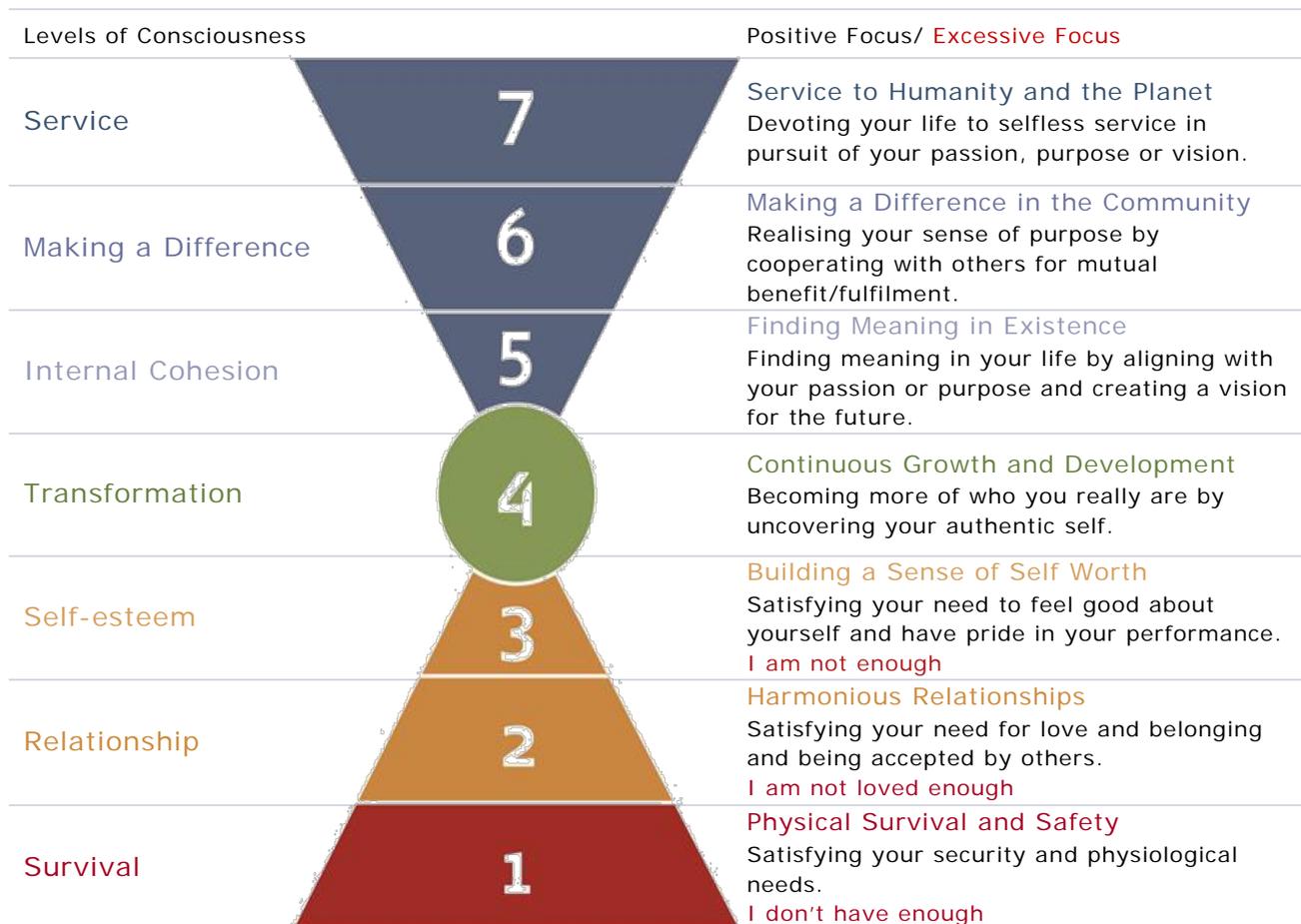
	Finance	Fitness	External Stakeholder Relations	Evolution	Trust/Engagement	Direction/Communication	Supportive Environment	Societal Contribution
<b>Desired Values</b>	financial stability	academic excellence discipline	parent involvement	passion for learning leadership development continuous improvement				
<b>Values Jumps</b>		quality being the best efficiency student achievement				shared vision		
<b>Potentially Limiting Values</b>		long hours bureaucracy	parent interference	short-term focus caution	blame apathy/ boredom control power silo mentality authoritarian	dishonesty confusion hierarchy information hoarding	job insecurity manipulation bullying	

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

The biggest shift among positive values is requested in Fitness, which denotes a request to increase focus on performance, quality and the effectiveness of systems and processes. Note also the increase requested in the area of Evolution, in respect of developing both people and practices.

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

## SEVEN LEVELS OF PERSONAL CONSCIOUSNESS



### 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. 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. Limiting values at this level include rivalry, intolerance and being liked.

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

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

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

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

### **Level 4: Transformation**

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

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

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

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

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

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

### **Level 7: Service**

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

## SEVEN LEVELS OF SCHOOL CONSCIOUSNESS



### DISTRIBUTION OF CONSCIOUSNESS

The unique character of schools is a reflection of their levels of awareness; how they think about themselves and the world around them is reflected in their behaviours. The Barrett model recognises seven distinct levels of consciousness that influence people's actions and decisions. The most successful groups 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 personal security, funding and health and safety.

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

## **LEVEL 2: RELATIONSHIP**

Level 2 focuses on the quality of interpersonal relationships between groups within the school community. It includes values such as open communication, conflict resolution, 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 systems, processes and rules that promote pride in performance, best practices and effectiveness. Examples of values at this level include productivity, excellence, efficiency, 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 and power seeking.

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

## **LEVEL 4: TRANSFORMATION**

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

## **LEVEL 5: INTERNAL COHESION**

Level 5 focuses on building a sense of collective spirit through shared school values and school vision. 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.

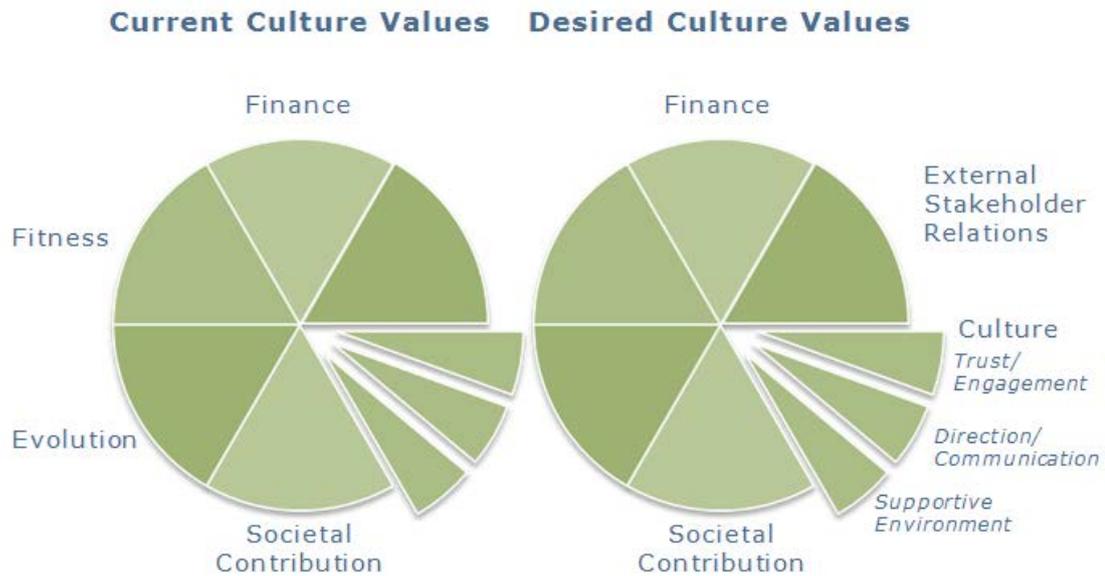
## **LEVEL 6: MAKING A DIFFERENCE**

Level 6 focuses on deepening the internal connectedness and expanding the external connectedness through local community awareness and involvement. Inside the school it includes values such as mentoring and leadership development. Outside the school it includes values such as partnerships, 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 a school, 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 an organisational context. By looking at the areas of current and desired focus, the BNS can be used to help guide a school's strategy for long-term success. These areas include:

### **FINANCE**

Finance looks at economic health with values and behaviours that have a direct impact on growth and budgetary management.

### **FITNESS**

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

### **EXTERNAL STAKEHOLDER RELATIONS**

External Stakeholder Relations highlights relationships with parents and other external stakeholders. This area includes values and behaviours that have a direct impact on the relationship with parents, the educational authority, and other academic institutions.

### **EVOLUTION**

Evolution covers innovation, group development and learning. Values and behaviours represented here have a direct impact on the development of people, processes, 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 school to the local community or society.

## **CULTURE**

Culture pertains to employee/ student support and group cohesion. The area of Culture can be broken down into three subsections:

### **Trust/Engagement**

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