

“[Values Technology] helped me understand at a very practical level how leadership values needed to be at the core of the blueprint I was putting together for the leadership center of a large Canadian bank. This experience transformed my practice. It is with great conviction that I can attest to the very substantial benefits an organization can gain by working with Values Technology.” – Hubert Saint-Onge

VALUES AND THE STORY OF THE HALL-TONNA VALUES INVENTORY

“Values are ideals that give significance to our lives, that are reflected through the priorities that we choose, and that we act on consistently and repeatedly.” – Brian P. Hall, PhD.

Values and Their Significance

A wise organizational developer, Viveka Chen, upon beginning an engagement with an NGO that had a beautiful, inclusive and well-thought-out strategic plan but couldn't understand why things were falling apart, observed “culture eats strategy for breakfast.” Often we strategize and plan and strategize some more to do our best at setting up our programs, projects and initiatives to perform at the highest levels without paying attention to values and culture largely because we haven't realized that we need to, or if we have realized the important influence of values and the culture they create in our organizational environments, we don't have the tools or the know-how for considering values in organizational development with intention and for performance success.

Values, Human Behavior and Personal Transformation

Values give significance to our lives and they mediate our inner and outer lives. These ideals are what combine to form our beliefs, determine our emotional responses and direct our outward behavior. These external expressions all flow from the values each person and group of people has. This value system is critical because it is what gives meaning to our individual lives as well as the lives of our organizations.

The Hall/Tonna Values System renders the human experience into 125 values—29 goal or “being” values, and 96 means or “doing” values—which encompass various dimensions of knowing, being and doing. The 125 values exist in relationship with one another across four world views or orders of consciousness each more progressively complex than the previous-- from foundational ones of safety, security, and belonging to more complex and visionary ones of presence, human dignity, wisdom, global sustainability and justice. By discovering and representing our unique landscape of values outwardly we become more self-aware, and more discerning of what values to prioritize and to cultivate. This activity is not only in service to an individual's development, it is also integral to the practice of leadership and organizational citizenship.

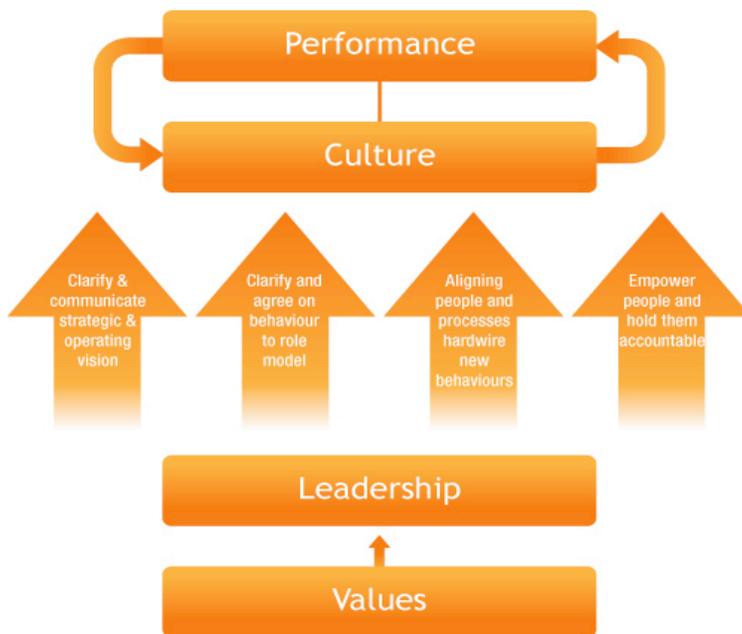
Just as each one of us has our own values portrait—a unique configuration or interacting

network of value priorities, so do the groups, organizations and other social networks with which we work. With an awareness of and facility with landscapes of values, we can perceive, make sense of and interact with the world in new ways.

Values & Organizations

“Strategic values are motivating to employees to the extent that they reflect employees' internal affective, normative, and task-oriented values, a zone of existing values.” – Laurie E. Paarlberg & James L. Perry, 2007

One of the most researched and understood social realities is that of the group. The study of group dynamics and its connections with psychotherapy, sensitivity training, encounter groups and high performance teams entered into our consciousness between 1945 and the 1980s. What we learned is that the quality of the relationships of individuals in the group alter the output of the group. It is the relationships between people that make any organization succeed or fail. These relationships are held together by the values people hold in common this is the values advantage.



So what exactly happens between these internal ideals that inform our emotions, behaviors and relationships and the performance of a group or organization? This connection between values and performance can be further understood with a quick exploration of leadership. Psychologist and Education Theorist Howard Gardner in his 1993 book *Frames of Mind* defined intelligence as the ability to fashion a product or solve a problem that's of value to a group of people. Based on this definition of intelligence. Elissa Perry in the paper "Multiple Styles of Leadership" (2004) defined leadership as the ability of an individual or group of people to develop and act on intelligence in self and others.

Since values inform our behavior that also inform how we exercise leadership and therefore how accomplish things and create the conditions for others to accomplish things – in other words, how we develop and communicate vision, make decisions, pay attention to alignment, empower people and hold them accountable. Thus values inform our behaviors that in turn shape our organizational culture and determine performance.

Makes good enough sense, lets look at our individual and collective values in the organization! The difficulty is that our values are 90% unconscious. It is when they and their levels of priority are

made explicit that the learning and transformation becomes possible and the relationships become more meaningful. The way this occurs is through values measurement.

Values Technology and the Hall/Tonna Framework

The twenty-first century is going to be about creating pathways to a sustainable Future. Creating a shared understanding of what data, information, knowledge, and wisdom mean to us, and how they interrelate to enable us to define and move along those pathways. This means applying a model of knowledge architecture from the position of values, principles and beliefs....” – Prasad Kaipa, 1999

Values Technology, Inc. (Values Technology) brings the tools and the know-how to measure, attend to and advance the values advantage. Values Technology is anchored by the unique framework developed and continuously honed by Dr. Brian P. Hall and associates since the early 1970's. This framework for identifying and understanding the values in a system has been repeatedly tested for both reliability and validity by academic institutions such as Santa Clara University in Santa Clara, California and Universidad de Deusto in Bilbao, Spain. The system has also been tested and refined through tens of thousands of assessments and consultations with global organizations including Hewlett Packard, Wallenius Wilhelmsen Logistics, Siemens, Alcoa and the American Red Cross.

Using the well-researched and independently validated values measurement instrument based on theory developed by Drs. Brian P. Hall and Benjamin Tonna, organizations can understand the collective values of employees, leadership and the organization, thereby improving organizational alignment to take advantage of market opportunities, improve customer service, and decrease costs of misaligned communication.

The Values Technology Vision

Values Technology envisions a world where the power of human collaborative potential has been unleashed creating new futures that deliver meaningful and sustainable communities, organizations and societies. To bring about this vision, we strengthen our clients at a personal and organizational level through the identification of core values and principles that drive and align culture toward success even in a world experiencing a global transition.

How It Works

Corporate culture is human and therefore flows from a set of relationships -- the relationships that form the environment from which all decisions flow, including ethical and moral choices because all relationships, conscious or not, are underpinned by values priorities. It is the collective priorities that form the basis for all decision making in an organization -- it is that simple. What is interesting is that values are measurable and so, by extension, is the capacity and efficiency of a team or group.

Values Technology, Inc. has engineered a multi-cultural values measurement system that accurately identifies an individual's, a team's and an organization's core values. Altogether there are 125 values that provide the basis for a technology that measures those values and makes them explicit. Values measurement makes our priority values explicit and therefore puts us in control of

our decision-making processes. The system employs a 125-question survey that tabulates one's values from a past, present, and future perspective, providing an accurate portrayal of motivations and goals to develop competencies, skills, decision-making ability and behaviors.

The ten-year development and validity process yielded two types of values measurement tools used with individuals and communities of practice:

1. **Individual Reports.** These are reports that an individual receives after completing a 125-item questionnaire. The person sees what his or her values are, in priority order, and what the implication is for his or her leadership and personal development. Several thousand skills are coded to the values, allowing a person to convert the values into specific capabilities.
2. **Group Reports.** These are reports on the value priorities of small or large groups. Group reports are used in a wide range of circumstances from team development to mergers analysis. Finally a composite of all these measures is used for team assessment and development.
3. **Document Analysis Reports.** Document Analysis can be conducted on organizational materials to ascertain the values being communicated. These reports are often used to check for a consistency of values and message across and organization and to its clients, constituents and/or customers. They can also serve as a guide for rewriting or re-conception of organizational materials and approaches to communication.

Values Technology in Action

Values Technology has helped hundreds of individuals and organizations in the U.S. and has been accepted by the American Psychological Association. Values Technology is also global and has worked with over 30 colleges and universities around the world, providing assessments in 10 languages with accredited affiliates in 6 countries. Our work with organizations also spans the globe and helps create alignment so that organizations and the individuals in them are able to develop and flourish in a direction of common good. Sectors with which we've worked include corporate, education, nonprofit/NGO, government, and religious institutions. Our ways of engaging with clients are custom tailored to the situation and can include individual leadership development, team development, organizational development and community development in whatever combinations is appropriate.

What it Looks Like

Misalignment: Situations that Values Identification Can Move Toward Resolution

An organization that is out of alignment can be beset with many different indicators. A common misalignment in organizations is between the organizational characteristics and what attracts, retains and engages staff. Others include:

- *New employees may not be aligned with organizational strategy. Aging workforce has been aligned with the organization but new hires have different sets of values driving their behaviors, which require a new management style to maintain engagement and productivity.*

- *Employees want to be Engaged.* Only one out of three employees is fully engaged in his or her job, according to the Towers Perrin Global Workforce Study conducted in 2008. According to that same study, another 28% are partly or fully engaged, whereas 43% are enrolled, meaning they are on the job and contributing, but not putting in the extra effort that could benefit the organization and improve business performance.
- *Customers want new choices.* Global warming and the switch to renewable energy sources are becoming greater concerns. Organizations will be pressured by the public to align the organizations choices with a different set of values than in the past to meet local and global needs.
- *Employees are expected to grow.* There is a lack of coaching, development and career planning in many of today's organizations, especially planning that is tailored to the needs of the employee. Many employees don't know what they need in their careers and need guidance, but that guidance can often be misguided and pushed by the desires of the supervisor, rather than pulled by the desires of the employee.
- *People want to be recognized.* A lack of recognition, praise and respect that meets the needs of each individual can be a foundational misalignment. Each employee has a different set of performance motivators that are internal and hidden. It can be challenging to uncover what engages each person to perform at their best.
- *Employees are still people.* Lack of perceived concern about employee problems; fun not encouraged. The gaps between a persons home life and work life is one determinant of their performance on the job.
- *Employees want fairness.* Not holding Colleagues accountable, not dealing with poor performers can lead to an environment of perceived unfairness. Coaching can be behavioral, and is sometimes mandated to be by different regulations, but effective coaching for leadership and more autonomous work needs to be at deeper level than behavior and skills training. And at times, poor performance may not be resolvable because of a distinct gap between values of the person and the organization.

Alignment: Case Studies

Clarica – A 100+ Year Old Mutual Insurance Company with Cultural Renewal Initiative and Merger with a Global 500 Financial Services Company.

Engagement

- Values-based Leadership Development of 100+ Executives
- Online Values Survey deployed to 12,000 employees to expedite change and cultural orientation during merger with Sun Life.

Results

- Transformed “entitlement” culture to a culture based on self-initiative and interdependence
- Created new brand based on Stewardship, Partnership, and Innovation
- \$3B Merger successfully completed in eighteen months

Wallenius Lines – A 140+ year old Global Shipping Company with Organizational Change Initiative and Merger with Wilhelm Wilhelmsen, a industry leading Global Shipping Services Company.

Engagement

- Values-based Leadership Development of 60+ Executives
- Values Survey deployed to 3,000 employees to expedite change and cultural orientation during merger with Wilhelmsen.

Results

- Creative new organizational culture based on Teaming, Innovation, Empowerment, Customer Satisfaction and Stewardship
- Americas Business Unit recently named one of the Top 25 “Great Places to Work”

Saint Mary’s College of California – Transformation to an academic department led by a clear set of visionary values for how the world could be and how we can get there.

Engagement

- Values analysis and leadership development plans for Masters Degree students
- Values and Leadership Coaching accreditation for program faculty
- Document Analysis

Results

- Establishment of program-wide core principles
- Alignment of programmatic values with materials and external communications
- Clear development pathways for students
- Quickly formed and deeply connected learning communities in program cohorts
- More effective implementation of leadership skills and capacities by students in their jobs, communities and families.