

# **Leading Successful Organisational Change Using Values Alignment**

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# **Leading Successful Organisational Change Using Values Alignment.**

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## **ABSTRACT**

The pressure of constant change, increasing technological complexity, rapidly escalating levels of competition, and heightened stakeholder expectations, coupled with the rise of knowledge workers, have all combined to force organisations, including Catholic schools, to evolve beyond the traditional bureaucratic model in order to remain viable in the twenty-first century. While the concept of a learning organisation is widely presented in the literature as the most suitable model for guiding such organisational change, the pace of its influence has been noticeably slow. This paper argues that such resistance to organisational change is caused by a failure of current organisational change strategies to attend to the personal consciousness dimension of those who work in the organisation. It is argued that a values alignment process is an essential component of any organisational change strategy. Hence, this paper presents and reports on a trial of a simple and effective framework for achieving values alignment in an organisation. In the light of data gathered in this trial, it is proposed that values alignment may not just be an important integral part of organisational change; it could well be the bedrock, the foundation, upon which all truly successful organisational change depends.

## **Introduction**

Every type of modern organisation, including a Catholic school, has little choice but to adapt to the relentless pace of change or it faces the risk of failure (Jamali, Khoury & Sahyoun, 2006). Rapidly changing technology, globalisation, uncertainty, unpredictability, volatility, surprise, turbulence, and discontinuity are commonly presented in the literature as some of the major new environmental forces for change that now face organisations (Brodbeck, 2002; Bunker, 1997; Wang & Ahmed, 2003). In response, organisations have commonly adopted such practices as downsizing, reengineering, merging, and restructuring. Life within an organisation is no longer what it used to be. In particular, it would appear that the traditional “psychological agreement, founded on the exchange of hard work and loyalty for a lifetime of employment, has been repeatedly violated and probably permanently undermined” (Bunker, 1997, p. 122). Arguably, these new practices represent essential organisational adjustments to a more competitive outside world. On the other hand, it also must be acknowledged that these organisational adjustments have had a profoundly adverse affect on the physical, social and emotional well-being of the people involved, and, thereby, on the overall effectiveness of the organisation.

Although organisations have had to adapt to new environmental criteria, too much emphasis has been placed upon making changes that influence external dimensions of the organisation and very little emphasis has been placed upon making essential changes that influence the internal dimensions of the organisation (Chippendale & Colins, 1995; Hultman, & Gellermann, 2002; Wallace, 2003). Despite research (Collins & Porras, 1998) showing that highly successful companies were generally more ideologically driven and less purely profit-driven than other less successful companies, there is little to show that organisations are widely committed to examining and changing their internal cultural dimensions that form their ideology. People want to work for a cause, not just for a living (Pollard, 1996). The quality of a person's work for the organisation is strongly influenced by the organisation's ideology, as experienced by its culture, yet insufficient research and organisational practice is devoted to this issue.

This paper seeks to achieve three outcomes aimed at redressing this deficiency. First, it seeks to clearly present the theoretical understandings that show the interdependency between the achievement of values alignment within an organisation's culture and the successful achievement of organisational change. Secondly, this paper presents a conceptual framework for effectively achieving values alignment within an organisation. Thirdly, this paper describes a practical application of this particular framework.

In the light of the outcomes generated by this practical application of this framework, this paper argues that values alignment is the bedrock of successful organisational change. It is the foundation upon which long-term success of an organisation depends. Until organisations are able to authentically clarify their strategic organisational values and then engender alignment between these strategic values and the personal values of their employees, organisations will be unable to sufficiently change and adapt in order to continue to be successful in the twenty-first century.

## **Literature Review**

The pressure of constant change, increasing technological complexity, rapidly escalating levels of competition, and heightened stakeholder expectations, coupled with the rise of knowledge workers, have all combined to force organisations to evolve beyond the traditional bureaucratic model in order to remain viable in the twenty-first century (Drucker, 1999). By necessity, organisations have had to become

increasingly aware that the world has changed necessitating a fundamental reassessment of objectives, operations, and leadership orientation (Jamali et al, 2006). In this new context, previous leadership perspectives are being challenged and long-held criteria for evaluating organisational effectiveness are being reassessed. Whereas, in the past those who worked in the organisation were chiefly considered as factors of production and profit, a different perspective is now required. Now, the onus is upon leaders to carefully nurture and skilfully manage the human resource within the organisation by focussing on such things as psychological commitment, communication, empowerment, teamwork, trust, participation and flexibility.

Also, people who now work in organisations are experiencing an increased desire for meaningfulness and fulfilment at work (Kinjerski & Skrypnek, 2006). The more employees experience personal purpose and meaning at work, the more they are committed to the organisation (Milliman, Czaplewski, & Ferguson, 2003). Mitroff and Denton (1999) argue that what gives employees meaning and purpose at work is: the ability to realize their potential; being associated with a good or ethical organisation; interesting work; making money; having good colleagues; believing they are of service to others; believing they are of service to future generations; and believing they are of service to their local community. Today, organisational leaders need to seek ways to facilitate the attainment of these employee desires and to attend to the employees' need to find meaningfulness and fulfilment at work.

Furthermore, this new leadership orientation is embracing innovation as a key ingredient of success and competitiveness (Khalil, 2000; Liyanage & Poon, 2002). This entails developing the creative potential of the organisation by fostering new ideas, harnessing people's creativity and enthusiasm, tapping the innovative potential of employees, and encouraging the proliferation of autonomy and entrepreneurship (Black & Potter, 2000).

In support of these changes, the concept of a learning organisation is widely presented in the literature as the most suitable model for guiding current organisational changes (Porth, McCall, & Bausch, 1999; Randeree, 2006). As defined (Senge, 1995, p. 3), a learning organisation is one "where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, and where collective aspirations are set free". It is argued that a learning organisation is one that promotes continual organisational renewal by weaving a set of core processes that nurture a positive

propensity to learn, adapt, and change (Jamali et al, 2006). Within the understanding of a learning organisation, the leaders are encouraged to adopt practices that not only carefully nurture and manage the organisation's human resource but also free up employees to be innovative and creative.

Furthermore, in the seminal work of Senge (1995) he posits five core disciplines as being essential to achieving a learning organisation; personal mastery, mental models, team learning, shared vision, and systemic thinking. According to Senge (1995, p. 10), a discipline is "a body of theory and technique that must be studied and mastered to be put into practice". However, Senge saw these disciplines as long-term goals to be aimed for rather than short-term behaviours to be practiced. It was envisioned that organisations would develop gradual proficiency over time in these disciplines through specific practice of inherent procedures or by acquiring new antecedent competencies. This is consistent with the characterisation in literature of the move towards becoming a learning organisation as a journey, rather than a destination (Burdett, 1993), as a dynamic quest, rather than a concrete outcome (Gardiner & Whiting, 1997; Örtensbald, 2004), and as a tentative road map that initially remains indistinct and abstract (Watkins & Golembiewski, 1995).

Hence, many scholars now perceive the learning organisation model as an ideal rather than as a fully achievable outcome (Jamali et al, 2006). This perspective acknowledges that, while very few organisations have been able to fully evolve all five of the sophisticated core disciplines necessary to qualify as learning organisations, many have adopted complementary characteristics that impact positively on the learning function thereby indirectly nurturing and supporting parts of these disciplines. Complex systems theorists label these characteristics as emergent rather than complementary. According to Auyang (1998, p. 174), "an emergent character of a whole is not the sum of the characters of its parts; an emergent character is of a type totally different from the character types of the constituents; and emergent characters are not deducible or predictable from the behaviors of the constituents investigated separately". Emergent characteristics of a learning organisation are not modified versions of the five core disciplines or deducible components of each discipline. Rather, they are worthwhile characteristics in their own right that, when embraced and imbedded into the organisation's general practices, act as a catalyst for its further development as a learning organisation by facilitating continued progress towards the advancement of one or more of the five core disciplines. Jamali, Khoury and Sahyoun (2006, p. 346) argue that the

development of empowerment, teamwork, trust, communication, commitment, and flexibility all qualify as relevant emergent characteristics for the achievement of a learning organisation as each contributes to the accomplishment of personal mastery, mental models, shared vision, team learning, and systemic thinking.

This understanding is in keeping with Wilber's (2000) integral theory for human and social development. A key concept within this theory is the four quadrants of organisational reality. The four quadrants arise from the notion that all entities possess an interior-exterior dimension and an individual-communal dimension. In the context of an organisation, the interior of the individual is the personal consciousness quadrant, the exterior of the individual is the role function quadrant, the interior of the communal is the organisational culture quadrant, and the exterior of the communal is the organisational structure quadrant (Cacioppe & Edwards, 2005). Moreover, Wilber (2000) argues that change in any one quadrant will always affect the functioning of the other three quadrants. In order to be fully successful, a learning organisation must seek to change not only the exterior and communal dimensions of the organisation but it must also address individual and interior dimensions, too. Arguably, the perception that relevant emergent characteristics will ultimately promote the development of a learning organisation can be explained by integral theory. Integral theory would support the view that relevant emergent characteristics in relation to the development of a learning organisation are in fact inherent components within the individual and interior dimensions of the organisation which are often overlooked by the usual learning organisation implementation strategies but yet are integral to its ultimate adoption. In addition, integral theory would suggest that the limited development of learning organisations is caused by implementation strategies having been far too narrowly focussed. The successful development of a learning organisation not only necessitates the commonly prescribed attention to changing the functional and structural dimensions of the organisation but also, it necessitates equal attention being given to changing the often neglected cultural and personal consciousness dimensions of the organisation, as well.

Hence, a contemporary healthy organisation, striving to become an authentic learning organisation, needs to achieve a balance between its interior cultural life and its exterior functional life at both the individual and communal levels (Cacioppe & Edwards, 2005). Consequently, academic researchers and organisational leaders are directing increased attention to the previously neglected concept of organisational culture and its effect on the personal consciousness of the employee

(Jreisat, 1997; Schraeder, Tears, & Jordan, 2005). Here it is claimed that culture allows organisations to align all of its external and internal efforts in order to meet its needs in the midst of change and uncertainty (Hultman & Gellermann, 2002). The influence of culture emerges whenever people join together to satisfy needs and wants and to clarify how things are to be accomplished. Just as the larger society has a culture and many subcultures, so too teams and organisations develop cultures as well. An organisation's culture is reflected by what it values, the dominant leadership styles, the language and symbols, the procedures and routines, and the definitions of success that make an organisation unique (Cameron & Quinn, 1999). Thus defined,

Organizational culture tends to be unique to a particular organization, composed of an objective and subjective dimension, and concerned with tradition and the nature of shared beliefs and expectations about organizational life. It is a powerful determinate of individual and group behaviour. Organizational culture affects practically all aspects of organizational life from the way in which people interact with each other, perform their work and dress, to the types of decisions made in a firm, its organizational policies and procedures, and strategy considerations. (Buono, Bowditch, & Lewis, 1985, p. 482)

As such, the culture of an organisation is said to have a profound influence on the behaviour of every individual within the organisation (Trice & Beyer, 1993). The culture of an organisation serves as a force drawing organisational members together and creating a sense of cohesion (Cartwright & Cooper, 1993), which acts as an informal control mechanism helping to define acceptable behaviour (Chatman & Barsade, 1995). In addition, the organisational culture provides employees with information that is necessary for them to function within the organisation (Jreisat, 1997) and guidance for the employees in knowing how they can be more supportive of the organisation's mission (Schultz, 2001). According to Barney (1986, p.660), organisations that "are successful at obtaining productivity through their people generally have an organizational culture that supports and values the worth of the employees". Attending to the creation and maintenance of an appropriate organisational culture is at the heart of leading a successful learning organisation.

To this end, attempts to understand organisational culture have inevitably raised the question of how employee attitudes and behaviours are influenced by the

psychological relationship between the individual and the organisation (Rhoades & Eisenberger, 2002; Van Dick, 2004; Van Knippenberg & Sleebos, 2006). This is referred to as the employee having an “affective organizational commitment” (Gautam, Van Dick, & Wagner, 2004) such that they have “an emotional attachment to, identification with, and positive involvement in the organisation” (Van Knippenberg & Sleebos, 2006, p. 573). Generally, people do not engage in cooperative acts easily because cooperation comes at a personal cost such as time, effort, and resources (De Cremer & Van Knippenberg, 2005). Rather, self-interested motives tend to lead individuals to favour non-cooperation over cooperation, especially when they can enjoy the fruits of the collective effort without fully contributing. Hence, having the ability to motivate employees beyond this tendency towards self-interest so that they are able to develop an affective organisational commitment is an important task of the organisational leader.

Central to the concept of an employee having an affective organisational commitment is the growing awareness of the need to nurture an accommodating consciousness within each employee by developing alignment between his/her values and those that underpin the success of the organisation. Values are the invisible threads of culture (Henderson & Thompson, 2003). Where the organisation nurtures alignment between organisational and individual values it induces more positive employee attitudes such as organisational commitment and job satisfaction (O'Reilly, Chatman, & Caldwell, 1991). When there is alignment between individual and organisational values there is also a natural connection between people throughout the organisation. All relationships – between one person and another, between the present and the future, between customer and product, a team and its goals, a leader and a vision – are claimed to be strengthened by aligned values. Strong relationships have strongly aligned values because values focus people's attention, they also lead to the alignment of everyone's efforts, which in turn strengthens relationships. When an organisation has a defined set of values that are embodied by all employees there is less need for overt management and control.

Values-aligned organisations do everything in their power to understand the influence of values within their organisation and strive to align employee values with those of the organisation (Henderson & Thompson, 2003). Such values-aligned organisations are described as being “passionate about what they do, their work is meaningful to them, they are clear about what they stand for, they genuinely care about their people, and they insist on creating a work environment and culture that brings out the

best in everyone” (Henderson & Thompson, 2003, p. 57). These organisations are aware of the impact of values on people, performance and outcomes. They work deliberately with values to create alignment between people’s values and those of the organisation. They recognise the immense power of values and how they can be used to create meaning in employee endeavours. Values-based organisations have the benefit of an explicit set of values that enable it to manage change effectively. On the other hand, organisations with unaligned values struggle to maintain their identity during periods of change. In an unaligned organisation people operate by objectives and obligations rather than by preference since there is little or no awareness of the values that underpin the organisation’s strategies. Values alignment is an ongoing process of building a cohesive culture in which the satisfaction and motivation of employees depends considerably on the ‘fit’ between their personal values and the values of their team and organisation.

However, organisational values alignment is not a naturally occurring or simple outcome to achieve since “values only exist in, and are a constituent part of, sentient consciousness – that is, subjective dimension. They are ‘made’ by sentient beings and, thereafter, projected outwards into the world of action and behaviour” (Hodgkinson, 2002, p. 2). Often within organisations, the people hold allegiance to a plurality of partially incompatible beliefs and values based on assumptions they individually hold about their own personal entitlements, constraints, and preferred courses of action (Wallace, 2003). This suggests that values are specific to an individual and only reside in the mind of that person. When people come together to form a group, team or organisation they each bring their own personally unique and individualistic set of values with them. As a collective, the group, team or organisation does not possess a set of values unless a majority of the individuals that have formed this group, team or organisation personally and authentically embrace each value within the proposed set. This understanding is captured in Hodgkinson’s (2002, p. 3) claim that,

In its full form, values are referred to as ‘distinctive’ of an individual or ‘characteristic’ of a group. This means that values are unique to the individual and descriptive of a group. It means one can always average or statistically treat an aggregate of individual values (the only place where values are experienced) in order to characterize the values of a collectivity, organization, or group.

Within the context of the individual, their personal values are an automatic but often subliminal driving influence in determining their behaviour (Branson, 2005a).

However, in the context of a collective group of people, any nominated team or organisational values are only guiding concepts as they still require the people to choose to act in alignment with them. If people within an organisation do not support the collective's values, then the organisation cannot implement these values (Henderson & Thompson, 2003).

In view of this understanding, it can be seen that the achievement of organisational values alignment necessitates the implementation of a process that involves two distinctive but interdependent actions. Such a process needs to, firstly, involve a deliberate values clarification procedure specifically designed to cooperatively discern the essential values that need to characterise the organisation in order for it to successfully achieve its vision and purpose. Secondly, this process needs to also involve a means by which each employee is encouraged to proactively support the application of these values in their everyday organisational behaviours. At the very core of organisational success there needs to be a deliberate and comprehensive organisational values clarification and alignment process.

In summary, this review of the literature argues that today's organisations are being forced to change due to the highly competitive, turbulent, and changeable nature of their environment. While the widely accepted learning organisation model provided some guidance for those organisations wishing to change, it has not been the organisational panacea that many had hoped. An explanation for the learning organisation model's lack of general success is proffered by integral theory. Here, it is suggested that the strategies for implementing a learning organisation are too narrowly focussed and generally overlook the essential cultural and personal consciousness dimensions inherent in organisational change. To this end, the role of values and values alignment are perceived as being critically important cultural and personal consciousness dimensions that organisations need to explore in order to remain successful. Consequently, the development of a practical and effective means for cultivating and nurturing values alignment in organisations is fundamental in advancing learning organisations that can prosper in today's challenging environment.

### **A Framework for Cultivating Values Alignment in a Team or Organisation**

It has been argued that until an organisation's values are aligned with those of its members, there is little chance of it operating at optimum efficiency. However, it must

also be realised that “failure to understand where values fit in an organisation’s structure and culture is a significant factor in the inability of so many organisations to live their values successfully” (Henderson & Thompson, 2003, p. 86). Values provide the embedded codes of a culture, which means that the starting point for attempting to understand cultural values is to identify the beliefs, behaviours, rituals, icons, symbols, actions, systems and decisions of the group (Hultman, & Gellermann, 2002; Kotter & Heskett, 1992; Schein, 1992). Hence, any process that endeavours to establish a more appropriate organisational culture needs to begin by clarifying the strategic values that are deemed to be essential for the ultimate success of the group as a whole.

However, strategic values clarification is not sufficient on its own. Once the strategic values have been named, there must be a supportive process that brings about values alignment amongst the collective group of people that forms the organisation. In this sense, alignment means “functioning as a whole” (Senge, Roberts, Ross, Smith, & Kleiner, 1994; p.352). Building alignment within an organisational context is about enhancing the group’s capacity to think and act in new synergistic ways, with full coordination and a sense of unity, because each person knows each other’s hearts and minds. Building strategic values alignment is about providing a cooperative and collaborative process whereby the members of the organisation can develop strategies, systems and capabilities that not only support those values that have previously been clarified as being essential for the ultimate success of the group as a whole but also are supported by the majority of people within the group as acceptable guidelines for directing their behaviour (Henderson & Thompson, 2003).

One such framework for achieving organisational values alignment is that developed by Robert Dilts (1996), who suggests that an organisation is the result of the interaction of what he refers to as its ‘logical levels’. Each logical level, although clearly defined as an entity in itself, is dependent on and influences all other levels. Dilts identified a number of logical levels that typically define an organisation’s culture. These are: purpose, identity, values and beliefs, capabilities, behaviours, and environment. These levels are said to represent the natural relationships that exist in social systems, with each level being more abstract than the one below, whilst also having a greater degree of impact on the overall system.

While Dilts’ logical levels model focuses attention on the organisation’s culture, and clearly establishes the place of values as a fundamental element of this culture, it can

be argued that it's anthropological, rather than psychological and values theory, foundations means that it does not fully capture the broad power and impact of the values. The nominated values appear as an adjunct aspect, rather than as an integral and embedded component, of the culture. By being seen as an adjunct aspect of the culture, the meaning and significance of any preferred organisational values are likely to remain vague and abstract. For such values to be able to positively influence the individual consciousness dimension of those who work in the organisation, the employees must be able to understand and proactively support the place and significance of these values within the culture (Hultman & Gellermann, 2002). Following the lead established by Branson (2005b) in researching the influence of personal values on behaviour, it is proposed that the key to positively influencing the employee's individual consciousness is in helping her/him to know how the organisation's strategic values are formed and how they are to be applied in order to create an appropriate and successful organisational culture. Just as it is important to know and understand the formational influences on one's personal values so as to recognise how they are able to influence one's behaviour, so too, it is argued, that organisational employees need to know and understand the formational factors of any preferred strategic organisational values. The people need to be able to clearly see how these values are important to the organisation's culture and how the application of these values can lead to a better and more successful organisation. They need to be able to know and understand the antecedent forces that support the adoption of these preferred values. Also, they need to be able to see how the application of these values will be able to change the organisation for the better. It is in this way that the employees are able to develop alignment between their personal values and the perceived strategic values of the organisation.

To this end, the following conceptual framework was created to help guide this essential values alignment process.

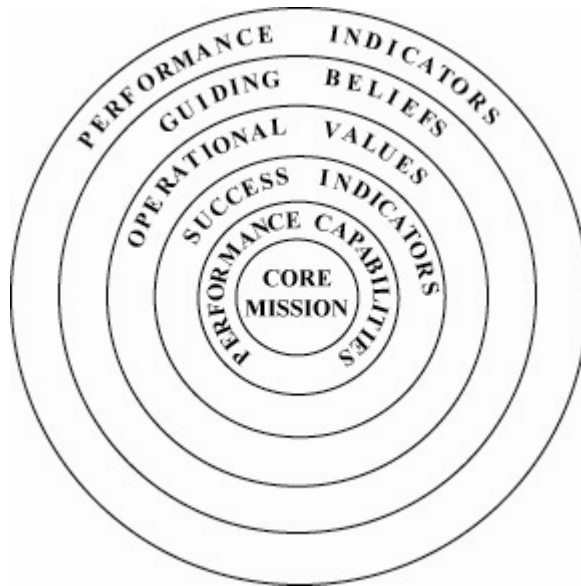


Figure 1 A conceptual framework showing the constituent aspects of an organisation’s culture that play an integral part in the achievement of values alignment.

In the context of this framework, the respective understandings associated with each of these proposed constituent aspects of an organisation’s culture can be described as follows:

(a) Core Mission – is the collaboratively discerned “controlling insight” (Buckingham, 2005, p. 13 – 16) as to that which is at the very heart of what the group is striving to achieve in order to create long-term success for the organisation. It describes what the group needs to do and, as such, it is distinct from, but related to, the organisation’s overall vision and mission statements. The Core Mission is a single sentence that uses rich descriptive words to describe not only what is seen as the core business of the collective group but also the manner and means for achieving it. As a controlling insight, the Core Mission must:

- Apply across a wide range of situations;
- Succinctly describe what would result from the achievement of excellence; and
- Guide essential action.

In describing these outcomes, the Core Mission becomes a source of potential organisational values in the mind of all those involved. Hence, these

perceived values have meaning for those involved since each individual can readily understand the significance of these values and, therefore, is in a better position for being able to willingly support and adopt them.

- (b) Performance Capabilities – are the strengths and weakness of the group, and each individual, with respect to the achievement of the Core Mission. Discussion of these crucial ingredients enables the group to develop confidence in its ability to achieve its Core Mission by either reinforcing its group and individual strengths or by overcoming its weaknesses through specifically targeted group or individual professional development. In this way, it affirms the existing talent and worth in the group and the individuals while also confirming the organisation’s commitment to its employees through its support for strategic professional development. Again, this open and transparent process provides clarification as to what is valued and why it is valued. In this way, the meaningfulness of such values is reinforced in the minds of the group members.
- (c) Success Indicators – are the perceived logical consequences that will be realized if the group is able to achieve excellence in the way it goes about its Core Mission. Getting the group to list the indicators of success that would naturally result if every group member was fully committed to the Core Mission provides motivation and stimulus to each individual to become engaged and to provide his/her quality contribution to the group’s activities. In this way, there is increased motivation for each individual to develop an affective organisational commitment and to adopt the group’s nominated strategic values.
- (d) Operational Values – are the nominated strategic values that appear as a natural consequence if each of the previous antecedent constituent parts of the organisation’s culture is to be achieved. However, since the reflection upon the stated Core Mission, the acknowledged Performance Capabilities, and the desired Success Indicators produces an abundance of nominated values, it is also essential that a secondary process is implemented that allows the group to prioritise the most important values up to a suggested maximum of 10 values. This ensures that everyone is more likely to be concentrating on applying the same values to their work environment. Having too many values is more likely to diffuse the commitment as it would be difficult for every employee to equally apply his or her self to a wide array of nominated organisational values.

- (e) Guiding Beliefs – are the agreed ways in which the application of each of the prioritised strategic values will produce a positive outcome for each employee as well as the group, overall. Taking the lead from Henderson and Thompson (2003, p. 107), the creation of such Guiding Beliefs is done simply by converting each prioritised strategic value to a belief by asking the group to complete the following sentence with each value:

‘We value [*value*] because .....

These authors add that:

Every time we have worked through this process with a group, people have commented on how powerful the experience was. To feel a group of people align on a single and unanimously agreed belief about a value is unifying and empowering. It also has an added benefit of being a wonderful team-building experience. (p. 109)

- (f) Performance Indicators – are the behavioural outcomes that can be expected to be seen enacted by a employee authentically living out these beliefs and values. The process so far has only developed a cognitive and emotional commitment to the nominated strategic values. By getting the group to publicly predetermine those behaviours that logically result from an employee proactively living out the strategic values not only makes it quite clear what is expected from each employee but also each person knows that others will be able to judge his/her personal commitment to these values by their behaviour. In this way, it is more likely that each employee will behaviourally commit to these beliefs and values as well.

It is argued that while each of these proposed constituent aspects of an organisation’s culture is able to provide a discrete and valuable contribution to the individual consciousness of the person, it is the synergistic affect achieved by working through each aspect as a contributing segment to the essential whole that achieves the most profound outcome. The full power and impact of this comprehensive values alignment process is only accomplished when each and every aspect is examined in the order suggested. In this way, an all-embracing understanding of the culture of the organisation is gained. As a result, the individual is able to more easily align his/her personal values with the organisation’s nominated strategic values while also sensing heightened workplace meaningfulness and fulfilment.

## **An Application of this Framework**

The following data is from an actual application of the proposed framework as it was applied in an Australian school context. In order to comply with standard ethical considerations in regard to privacy and confidentiality, the name of the school has been changed and no personally distinguishing features with respect to the participants are provided.

Queensland College is a relatively large coeducational Australian school. It has a well publicised school mission statement and regularly proclaims its preferred community ethos in its various publications and through its particular key celebrations. A central theme within this mission statement and preferred ethos is the wish to engender harmony and cooperation throughout its school community and in all of its endeavours. Despite this clear acknowledgement of the school's preferred values and beliefs, disunity and disharmony had infiltrated the relationships amongst the school's secretarial staff group.

This group consists of six staff members: a receptionist, a student registrar, a financial secretary, a confidential secretary, an enrolment secretary, and a teachers' resource secretary. While each staff member has a specialist area of responsibility, there is a general expectation that the group is to function as a team in order to assist with general word processing requirements, document distribution, student first aid needs, and day-to-day requests from teachers, students, parents, and visitors. In many ways, the functioning of this particular staff group impacts on everyone in the school community. Also, the demeanour of its members influences the reputation of the school within its own community and the local community through the quality of the service that this group provides.

From an observer's perspective, pivotal power struggles appeared to be undermining the proper functioning of this group. A very long serving member of the group seemed to be rallying some others to support her wish to question the quality of the work of the newest group member. As this situation progressed, the new member began to complain to her office manager of being isolated from the group and unable to gain the necessary cooperation from two of her colleagues that she required in order to adequately complete her duties. Despite the action of the office manager to try to establish collaborative work practices amongst the group, the situation did not appear to change. Consequently, not only did the health of a couple of the group members become a concern but also there were indications that either or both of the

antagonists were likely to register a formal complaint of inappropriate workplace behaviour by their colleague.

As an attempt to circumvent this possible action, as well as to endeavour to establish a healthy and meaningful working environment, all six of these office staff and the office manager participated in a professional development programme that utilised the framework described above. In response to this framework, the following data were generated:

**(a) Core Mission**

1. Is the Queensland College secretarial staff group a Team?

*Yes, others see us as a team and we are called upon to cover for each other on occasions. If we are a team then we need to help each other and be loyal to the 'team' plan.*

2. Who does this team serve and what do they want or expect from this team?

*We serve the whole school community – students, parents, teachers, school officers, groundsmen & cleaners, local community. They each have different specific expectations but generally they all want help to access knowledge about the school or personnel in the school.*

3. What is the essential task of this team?

*To provide a service to each of these. To be polite, helpful, welcoming, and happy to be of service to them.*

4. In achieving this task, what distinguishes this team from others aiming to achieve a similar outcome?

- *Using specialist skills and knowledge essential for the direct benefit of others*
- *Providing support – helping others to perform more efficiently*
- *Being trustworthy – responsible, reliable, competent and of good character*
- *Being a specialist – gifted – able to do a unique task for the good of the school community*
- *Having the right character traits so that others will trust us.*

5. What is at the very core of what this team is trying to achieve?

*Enthusiastic and quality Service*

6. Create a single sentence Core Mission statement for this team that captures these insights.

*The Queensland College secretarial staff is a team of office professionals who strive to provide specialist service to all associated with the school community.*

**(b) Performance Capabilities**

1. In order to achieve this Mission, what are the real strengths of this team?

*All women, multi-skilled, flexible, able to cope with change, good people, enthusiastic, interested in our work, want to work better together, have a commitment to school mission statement values, willing to improve knowledge and skills.*

2. How can these strengths be maximised?

- *Ongoing professional training*
- *Implement and review of job profiles*
- *Communicate job profiles amongst team and to wider community*
- *Roster team members to attend and report back on mid-week staff briefing in order to keep team aware of what is happening in the school*
- *Have 'key presenters' attend team meetings to provide specific information about essential parts of the school*
- *Provide a School term calendar to the team*
- *Develop appropriate timeline work schedule at the beginning of each term that anticipates and caters for busy times*

3. What personal strengths do you contribute to this team?

*(private reflection)*

4. What are the clear weaknesses of this team and how can they be overcome?

- *Individuals with strong emotions – all need to learn to control this*
- *Lack of trust in team – must start taking small steps to build up the social and emotional attachment with each colleague*

- *Lack of respect for colleagues both personally and professionally – be proactive to stop this by concentrating on empathy and team work*
  - *Need to continue to improve technological skills – ongoing need to enhance specialist skills as individuals and as a team*
  - *Need to strive to maintain accurate procedural guidelines so that others can more easily cover for absent team members*
  - *Need to have clear understanding of the specific roles and responsibilities of each of the other team members*
5. What personal weakness can you attend to so as to enhance the strengths of this team?

*(private reflection)*

**(c) Success Indicators**

1. How will the team know when it is achieving its mission? or
2. What are this team's *success indicators* to look for?
  - *Receiving positive comments from community members about what I/we am/are doing*
  - *Meeting all deadlines and timelines – not letting others down*
  - *Coming to work, and going home, feeling positive and satisfied*
  - *Feeling happy, confident and positive*
  - *Having a sense of purpose, co-operation & support across whole team*
  - *Each team member believing that she is fully contributing to the team's overall success and positive morale*
  - *Sincere encouragement and emotional support is offered to all members of the team*
  - *There is open communication, which depends on each team member being independent and confident and this allows team members to talk freely with colleagues directly in order to create better ways of doing things*
3. What is the most critical *success indicator* for this team?

*At this point in time, reaching a point where each team member can feel happy, confident and positive in their work within the team.*

**(d) Operational Values**

1. What operational values arise from all previous discussions?

<u>NOMINATED VALUE</u>	<u>RATING</u>	<u>ACCEPTED</u>
<i>Respect</i>	6	✓
<i>Trust</i>	6	✓
<i>Communication</i>	6	✓
<i>Honesty</i>	5	✓
<i>Loyalty</i>	4	✓
<i>Courtesy</i>	4	✓
<i>Achievement</i>	0	
<i>Reliability</i>	4	✓
<i>Responsibility</i>	5	✓
<i>Understanding</i>	3	
<i>Empathy</i>	4	✓
<i>Co-operation</i>	7	✓
<i>Harmony</i>	3	
<i>Encouragement</i>	2	
<i>Collegiality</i>	0	
<i>Professionalism</i>	7	✓

2. What values should each team member display in order to achieve these success indicators?

*Collaborative prioritisation process (max. rating = 7). A tick adjacent to the value indicates acceptance as a preferred strategic value for the group.*

**(e) Guiding Beliefs**

*We, the Queensland College Office Staff value –*

*COOPERATION – because we are a team and a team works together*

*PROFESSIONALISM – because we have confidence in each others' specialist skills and knowledge*

*RESPECT – because it recognises the importance of treating others with dignity just as we would like to be treated*

*TRUST – because it is through trust that the team gains confidence in each other*

*HONESTY – because it builds essential trust amongst the team*

*RESPONSIBILITY – because it is the cornerstone of being able to provide a service to others*

*LOYALTY – because we need to be able to depend on each other*

*COURTESY – because it shows that you believe other team members are important, skilful, and contribute to the team*

*RELIABILITY – because it means that your work is not adversely affecting the work of other team members*

*EMPATHY – because it reinforces our commitment to the co-operative values outlined in the school's Mission Statement*

*COMMUNICATION – because each person deserves to be heard.*

**(f) Performance Behaviours**

1. If the team is working together in accordance with these values and beliefs, what would each team member be seen doing?
  - *More regular whole-of-group interaction*
  - *Regularly contributing to the development of a happy working environment*
  - *Willingly co-operating, sharing wisdom, and striving together with other team members in order to do things more efficiently and effectively*
  - *Having a commitment to ongoing professional development*
  - *Displaying increased enthusiasm*
  - *Offering sincere praise and encouragement to each of the other team members*
  - *Being a willing and active participant in open communication*

- *Showing that they are committed to achieving this Team Plan by what they are doing as much as by what they are saying*
2. Draw up a personal plan for the next 5 working days that states 4 things that you will start doing in order to make your contribution to the team beginning to achieve its stated Core Mission.

*(Personal Plan)*

Although this particular example of the use of this values alignment process was only recently implemented, such that there has been insufficient time for the recording of any long-term changes should they eventuate, the initial feedback provides promise and optimism. It has been reported that within the first two days following the experience of this process, each participant had personally and confidentially provided unsolicited endorsement and praise for having had the opportunity to participate in this process. All participants were unanimous in their admiration for the wisdom and insight that they had gained. They expressed hope, optimism, and commitment as well as renewed enthusiasm and confidence. Also, there was a willingness to be involved in small but noticeable work-related group activities and discussions. Humour and laughter were again evident. Given the expectation that this school office group were committed to regularly reviewing their outcomes from the values alignment process, with the understanding that they would continually review and refresh their commitment to its ideals and practices, there was a firm belief that this process had succeeded in establishing the necessary basis upon which successful organisational change could occur. Not only had it positively changed the working environment for these office employees but also it had created the belief that the quality of their work was set to improve.

Given that this positive outlook was achieved in a reactive context, it is arguable that far more could be anticipated in a proactive situation. In a reactive situation, the values alignment process is being used to rectify existing seriously inappropriate work practices. Whereas, in a proactive situation, the values alignment process is used to finetune an organisational culture so that it can continue to develop as a learning organisation. The particular values alignment process described in this paper was initiated in reaction to an acknowledged ineffective and inefficient working environment. Hence, this group had to overcome well established resistant and unhelpful attitudes and habits in order to begin to benefit from the values alignment process. It is likely that, without these additional constraints, the power and impact of

this process on the participants would have been far more immediate and extensive. However, of note is the insight that even in a reactive situation, there is great benefit to the organisation from being able to provide a simple and effective means by which those who work in the organisation can readily align their personal values with the organisation's preferred strategic values.

Furthermore, reflection on the immediate and potential benefits that can be gained from this particular values alignment process with this group surfaced some unexpected but important possibilities. Not only did the participants believe that they had gained a heightened sense of the meaning and importance of what they did for the school and how they were to do it, but also they raised some other possible outcomes from the data generated. This included using this data for improving personnel selection processes when needing to replace someone in the group, being able to describe each role and responsibility better, enhancing interpersonal relationships, and specifying real and meaningful accountability practices.

## **Conclusion**

Arguably, people employed in Catholic education work in a values-rich environment. Our vision and mission statements invariably encapsulate essential Gospel values that endeavour to inspire communally accepted attitudes and behaviours. Moreover, often it is assumed that all those who work in Catholic education not only totally support these values but also share a common understanding of how these values are to be applied. However, in an ever increasing individualistic, secular, and unchurched society, this may well be an invalid assumption. Today, Catholic schools, just like every other organisation, need to work at creating alignment between organisational and personal values, particularly during times of cultural change.

When all is said and done, individual people create every organisation including Catholic schools. In other words, Catholic schools are, in the first instance, a collection of individual people. This implies that changing the people should be the first step in any process that seeks to change the school's culture. If there is a need to change the school's way of doing things, then the first consideration should be to bring about an appropriate change in each person within the school community affected by the change before turning attention towards changing the non-human parts of the school's organisation such as the structures, the processes, and the preferred practices. However, much of the literature associated with organisational

change tends not to focus on the internal understandings of the people as they face the inherent demands within the changes being proposed.

This paper argues that successful organisational change, even within a Catholic school, begins with, and depends upon, changing the individual consciousness of those who work in the organisation. Moreover, it is through the implementation of a comprehensive values alignment process that it is possible for Catholic schools to properly prepare the individual consciousness of its employees, and the school's organisational culture as a whole, to be able to constructively cope with the changes needed to ensure the school's long-term success and viability. Indeed, values alignment may not just be an important integral part of organisational change within a Catholic school; it could well be the bedrock, the foundation, upon which all truly successful change depends.

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