

Excellence
with Integrity™

Workplace
Culture
Assessment

OVERVIEW

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Excellence with Integrity™
I N S T I T U T E

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Introduction: Rigorous, Resilient, Fair

There is no single simple metric by which to assess something as complex as organizational culture. However, the essential aspects of culture clearly ***can be measured*** to yield vital data needed to develop it in intentional ways for the betterment of every employee/staff member, as well as leadership. The Excellence with Integrity™ Workplace Culture data tools and metrics, when implemented in conjunction with thoughtful deliberations and relationship building, have the potential to inform the process needed to create, sustain and nurture an intentional culture where there is consistent and authentic alignment between espoused values and lived experiences.

It is possible to create a *tyranny from metrics* where data are not utilized to create a full and accurate description. In this reality, data are often used as a weapon and not a tool. In contrast, the Excellence with Integrity Workplace Culture assessment and development process has been developed to provide ***nuanced*** data to inform intentional conversations about essential aspects of competitive performance cultures, which are inherently complex and dynamic.

We believe the process we have vetted through many years of working with clients is theoretically sound and practically rigorous. Our experience shows that organizational data are capable of showing real differences between teams, departments, and whole organizations, and between different leaders with different leadership styles. But our process is resilient in that it doesn't over-respond to an unhappy employee/staff member or an incident in the life of the team or organization. The process is fair to both employees/staff and leaders. The data we have worked with over the years consistently show employees/staff "admitting" 'we're not working hard enough,' 'we don't like constructive criticism,' and 'we could be better at x, y, or z.' This kind of feedback is often in support of what leaders are seeing as key barriers to staff development and performance improvement for the organization. However, the process also allows for fair feedback to leaders regarding how particular leadership practices might be missing the mark, or working against performance excellence, teamwork, initiative, or growth mindset.

The systematic use of an intentional approach, such as provided by the Excellence with Integrity Workplace Culture Assessment, will provide vital feedback for continued growth of leaders' expertise in shaping their team/organizational culture, which is the foundation of the employee/staff culture experience – and ultimately their performance.

Survey Content and Structure

The Workplace Culture Survey has been developed for, and with, organizational leaders to support continuous organizational improvement.

The survey seeks insights on performance excellence, personal and organizational integrity, communication, teamwork, growth mindset, and well-being among employees/staff members.

The survey also gathers feedback on leadership and mentoring practices, such as communication of expectations, targeted skill development and professional growth, mindset formation, accountability, and initiative that ensure performance excellence.

The same survey is completed by employees/staff members and by leaders. This approach to data collection allows for side-by-side comparison of stakeholder perspectives and supports review of the results as an informed, balanced, and fair process.

While focusing on performance enhancement, the survey results are also instrumental in creating a culture that promotes safety, integrity, and inclusion. Results can guide strategic planning, as well as intentional human development and productive performance review at the team, department, and organizational level.

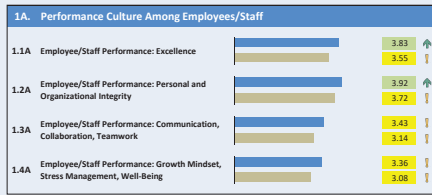
 Workplace Culture Assessment	
Survey Matrix	
Part A	Part B
Performance Culture Among Employees/Staff	Leadership, Mentoring and Support Practices
1.1 Performance Excellence	2.1 Communication to Clarify & Reinforce Expectations
1.2 Personal and Organizational Integrity	2.2 Skill Development, Professional Growth, Well-Being
1.3 Communication, Collaboration, Teamwork	2.3 Accountability through Support and Challenge
1.4 Growth Mindset, Stress Management, Well-Being	2.4 Promoting Confidence, Initiative, and Optimal Performance Mindset
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Data Report At a Glance

Part A

Performance Culture Among Employees/Staff

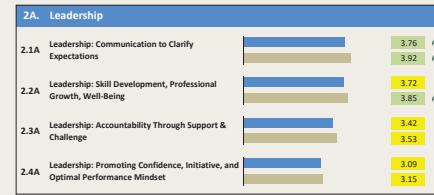
- 1.1 Performance Excellence
- 1.2 Personal and Organizational Integrity
- 1.3 Communication, Collaboration, Teamwork
- 1.4 Growth Mindset, Stress Management, Well-Being



Part B

Leadership, Mentoring and Support Practices

- 2.1 Communication to Clarify & Reinforce Expectations
- 2.2 Skill Development, Professional Growth, Well-Being
- 2.3 Accountability through Support and Challenge
- 2.4 Promoting Confidence, Initiative, and Optimal Performance Mindset



SUMMARY REPORT

Survey Data Summary

Data Detail

Item Tables

Comments

Summary Report presents scores on the Poor-to-Optimal performance scale, shown both graphically and numerically.

Aggregated scores for each of the eight areas allow for a quick overview of the overall results for the team.

The remaining pages in the Summary Report show individual question scores in each area allowing for a deeper understanding of the findings.

Item tables show frequencies (percentages of responses to each response option), means, standard deviations, and valid Ns for each item (question), organized in the same order as in the Summary Report.

Comments are presented as submitted without edits and without any individual-identifying indicators.

Scores

Respondents answer questions on a 1-5 scale: 1 = poor, 2 = fair, 3 = good, 4 = very good, and 5 = excellent.

Area scores and individual item scores are calculated as averages (means) and then broken down into the following four categories indicated by color and an icon on the right-hand side of the score:

Optimal performance: Maintain current focus and attention	Scores ≥ 4.5	
Approaching optimal performance: Build on current focus and attention	Scores ≥ 3.75 and < 4.5	
Area of opportunity: Intensify focus and attention	Scores ≥ 3 and < 3.75	
Area of concern: Commit to intensive effort & focus on improvement	Scores < 3	

Report Review

The report provides insights into the employees’ and leadership perspectives about their experiences of the Organizational Culture and of the Leadership Practices that shape these experiences, as well as whether the perspectives are aligned. The purpose of this assessment is to initiate specific, intentional, and calibrated culture development steps.

In **Part 1** of the Culture Assessment, the analysis centers on the four areas of employee/staff performance as identified in the Excellence with Integrity Optimal Performance pinwheel. The review of the results would look for evidence of (a) strength within each area (independent of the other three), and for (b) interdependent balance between all four areas.

Organizational Culture: Employee/Staff Performance



In **Part 2** of the Culture Assessment, the analysis centers on the four categories of culture-shaping leadership practices that lead to optimal performance. The review of these results would discover insights for leaders looking to improve their culture-shaping practices.

Culture-Shaping Leadership Practices



Review Steps

First, we study the data reports looking for specific culture development insights. Data review begins by looking at the team SUMMARY for trends and patterns, and then verifying them by reviewing additional detail in the TABLES and in COMMENTS.

From the Summary reports evidence is gathered about questions like:

- a. Are the stakeholder perceptions positive or negative?
- b. Are the stakeholders aligned in their perceptions?
- c. Are there strengths within one area (performance excellence, teamwork, etc.)?
- d. Is there balance (or imbalance) between areas (e.g., strong press for excellence with weak growth mindset or lack of teamwork)?
- e. Is there solidarity or division between subgroups?

From the Tables we then look to see:

- f. Is there a house divided (e.g., some teams/departments feel X, whereas others feel Y) or is their consistency of perspective (e.g., most agree that X is a problem and Y is a strength)?

From the Comments we then look to see:

- g. Are there specifics in the comments that may help to explain an overall trend or a trend within a subgroup?
- h. Are there specific experiences or leadership practices that are contributing to the developing culture or causing distress?
- i. Do the comments indicate a pattern of simply missing the mark (e.g., too much or too little press for excellence; communication that is too harsh; lack of support around an issue or topic)? Or do the comments suggest unsafe, unhealthy, unfair experiences that are simply not okay?

The **second** major step is to integrate and interpret the results in order to determine the overall organizational culture trajectory and next steps for its development.

The process of thorough review of the culture assessment results helps to assess whether it is on an upward or downward trend. A downward trend, clearly, represents a situation when culture has become toxic, unbalanced, or ineffective, and therefore presents an acute risk. To distinguish between a team/department/organization that hit a temporary tough patch and one that is on a downward spiral, longitudinal data might be necessary. Examining duration and intensity of the stress within the culture is needed to ultimately determine whether it is unsafe, unhealthy, or represents an overall brand threat to the organization.

Culture Assessment Value-Add

The Institute brings research expertise that helps extend your capacity:

- 1) Integrated approach to assessment based on psychological and sociological research insights (principals hold PhDs in respective fields).
- 2) Over 25 years of experience in applied human, organizational, and leadership research and development.
- 3) The Leadership Through Culture and Character™ theoretical framework and supporting field research across multiple organizations and collegiate athletics departments.

1) Expert survey design:

a. Constructive: questions focus on culture practices and experiences identified by research as essential for strengthening performance so that results help identify insights for continuous improvement in a positive and constructive manner.

b. Objective: all results are presented in full and without subjective interpretation, bias, or exclusion.

c. Efficient: surveys use as few questions as possible.

d. Psychometrically sound: e.g., scales are balanced in size with consistent response framework.

e. Consistent: constructs support implementation across multiple teams/departments/organizations.

2) Data management/analysis/reporting:

a. Human-run analysis: since survey responses are rarely fully complete, we extract raw data and manage it using situation-appropriate techniques to ensure data integrity and consistency from organization to organization and from year to year.

For example, we select only responses that meet the specific criteria for completeness that are determined based on the needs of the team, department, or organization; we only calculate scale scores when a specific threshold is met for items in the scale having responses so that each scale score is representative of complete responses.

b. Standardized interpretation: consistent data coding (and recoding when necessary) during

data processing for all Likert-type questions and scales ensures that presentation of results is always the same: 1-5 response scale, 1 being least optimal (red), 5 being most optimal (green). Users do not need to learn new types of meaning behind different coding schemes when going from section to section, or from question to question.

c. Three levels of presentation: results are aggregated by scale for an easy overview of the overall trends, then shown by item graphically and numerically, and supplemented with detailed tables with frequencies, means, standard deviations, and valid Ns.

d. Graphical, numerical, and color/symbol-coded presentation of results, shown next to each other, matches different stakeholder needs and enhances identification of trends and insights.

3) Independent perspective and legitimacy of a Third Party Provider:

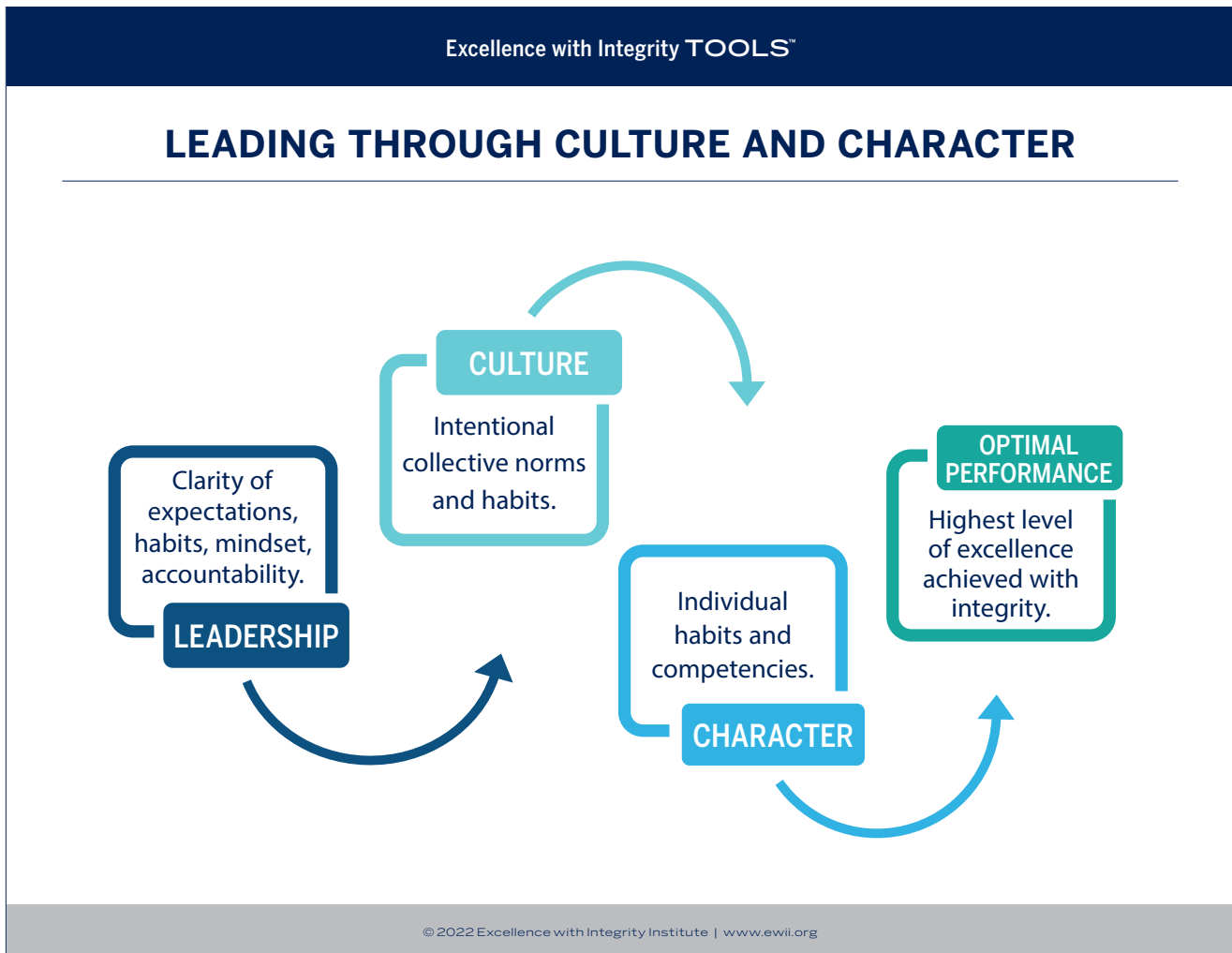
a. Confidentiality of all results is achieved in several ways: aggregation of data, suppressing results with too few responses, fully anonymous collection, etc.

b. Independent collection, data management, and analysis ensure the **atmosphere of safety and trust** which, in turn, empowers staff to provide objective feedback that focuses on team improvement, rather than individual goals.

4) Non-profit pricing:

The Institute pricing provides great value as it does not include a profit margin.

Theory At a Glance



Our vision of Excellence with Integrity requires individuals who have self-awareness, perseverance, flexibility, and a relentless commitment to continuous improvement. It also requires the support and challenge of leaders. We like to think about people pulling themselves up by their own bootstraps, but most often human excellence occurs in the context of a supportive community, and under the guidance of qualified leaders.

Optimal performance requires employees/staff who are willing to grow, and leaders who embrace their role as mentors. Leading for optimal performance is so essential because the quest for achieving Excellence with Integrity is a never-ending, dynamic, and difficult process. In our experience even those with great natural ability and capacity require mentoring to maximize their potential. They must be mentored, and they must be committed to a process of continuous improvement. And while it is somewhat of an art to find the right approach for the circumstances and individuals, there is also a research-based best practice science to shaping optimal performance habits.

In short, great leaders intentionally shape their organization's culture and develop the individual competencies and habits of its members in order to achieve performance excellence, pursue continuous improvement, and ensure long-term organizational success.

Psychometrics At a Glance

The tables below summarize reliability and confirmatory factor analyses performed on the data from a range of organizations.

Cronbach's alphas range from 0.942 to 0.966 indicating 'excellent' reliability (internal consistency) observed in the data. Factor analyses explain between 65.9% and 80.9% of the variance in the data confirming the validity of the survey content.

Means, Reliability Alphas, and Variance Explained in Confirmatory Factor Analysis

	Valid N	Cronbach's Alpha	% Variance Explained	N of Factors	N of Items	Mean	Std. Deviation
Performance: Excellence	643	0.947	68.2	1	10	3.06	0.863
Performance: Personal and Organizational Integrity	612	0.942	65.9	1	10	3.28	0.870
Performance: Communication, Collaboration, Teamwork	618	0.943	66.3	1	10	3.19	0.854
Performance: Growth Mindset, Stress Management, Well-Being	590	0.953	70.4	1	10	3.04	0.842
Leadership: Communication to Clarify and Reinforce Expectations	567	0.959	78.0	1	8	3.11	1.020
Leadership: Skill Development, Professional Growth, and Well-Being	521	0.961	78.5	1	8	2.93	1.062
Leadership: Accountability through Support & Challenge	525	0.955	76.0	1	8	3.15	1.075
Leadership: Promoting Confidence, Initiative, and Optimal Performance Mindset	527	0.966	80.9	1	8	2.99	1.067

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Workplace
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Leading for
intentional culture
ensures success



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