



Values in Practice - Assessment & Action Planning Template

Assessment for individuals and teams

3 WAYS TO USE THIS ASSESSMENT

For Self-Reflection

1.

Assess the degree to which you believe that the statements are true which correspond to the values listed in Sections 1-4.

Use the blank boxes in Sections 5-6 as needed to list other values that may apply to your organization, along with your assessment as to how well actual behaviors support those values.

Assign a total score for each section.

For Discussion with Your Manager/Team

Ask your manager to predict how you or your colleagues will assess the alignment between values and behaviors/actions, and have your manager complete the assessment from their perspective.

Meet with your manager 1:1 or as a team to compare scores. Where scores are far apart, discuss possible reasons, seek clarification, and determine which gaps are most crucial for your team to address sooner vs. later.

Agree on steps your team can take to best address these gaps.

Determine which gaps must be addressed by someone outside of your team or department, which need to be escalated, and by whom.

2.

Continuous Assessment

3.

At agreed-upon intervals, re-take this assessment at least one month later to see where gaps may persist.

Discuss the reasons gaps may still exist, and identify what steps are needed to close them, whether within your own team or across the organization.

Assessing Your Values/Behaviors Alignment

Read each statement and rate how true this is for you on a scale from "1", meaning strongly disagree and "5" meaning strongly agree.

SECTION 1: TRUST AND AUTONOMY

STATEMENT	RATING
I feel trusted to manage my own work schedule without excessive oversight.	
Decisions that affect my work are made transparently.	
Leadership provides clear goals without micromanaging.	
I have flexibility to work where and when I'm most productive	
SECTION 1 TOTAL	

Open-ended questions to brainstorm possible actions

What policies or practices help build trust in our workplace?

Where do you feel trust is lacking, and what changes would help?

SECTION 2: INCLUSION AND FAIRNESS

STATEMENT	RATING
Career growth opportunities are equally accessible to all employees, including remote and in-office employees	
Compensation and promotion decisions feel fair and transparent.	
I feel included in important conversations, regardless of where I work	
Our workplace policies reflect diverse backgrounds and needs.	
SECTION 2 TOTAL	

Open-ended questions to brainstorm possible actions

What barriers to inclusion do you see in our current policies?

What changes would make our workplace more equitable?

SECTION 3: INNOVATION AND RISK-TAKING

STATEMENT	RATING
I feel encouraged to share new ideas without fear of failure.	
The company provides time and space for creative problem-solving.	
I have a clear way to propose ideas and improvements.	
Leadership supports experimentation and learning from mistakes.	
SECTION 3 TOTAL	

Open-ended questions to brainstorm possible actions

What policies encourage or discourage innovation in our organization?

What changes can we make to encourage and appreciate more innovative thinking?

SECTION 4: EMPLOYEE WELL-BEING

STATEMENT	RATING
My workload is manageable, and expectations are realistic.	
The company actively supports mental health and work-life balance.	
Meetings and communication expectations allow for focused work.	
I feel comfortable setting boundaries between work and personal life.	
SECTION 4 TOTAL	

Open-ended questions to brainstorm possible actions

What workplace practices support your well-being the most?

What changes would help reduce stress and burnout?

Note: If your organization has values not included in the previous sections, please add them here. Then list statements that describe behaviors or actions that might support those behaviors. Rate each statement as before - 1, meaning strongly disagree and 5 meaning strongly agree.

SECTION 5:

STATEMENT	RATING
SECTION 5 TOTAL	

SECTION 6:

STATEMENT	RATING
SECTION 6 TOTAL	

The results of your assessment indicate where your team or organization's values are/are not aligned with current policies, behaviors, attitudes or actions.

Let's look at how you can use the results of this assessment.

-  Identify areas with the lowest scores and zero in on misalignments that matter most to you and your team 
-  Identify areas with the highest scores to amplify and preserve those values 
-  Discuss your team's scores with your manager and identify steps you can take to close the gaps 
-  Brainstorm possible actions, within your own team and across the organization 
-  Agree how your team can ensure that values and actions are aligned going forward 



HAVE YOU FOUND THIS ASSESSMENT HELPFUL?

Are you interested in learning more about how your team can have open, honest, safe conversations to help align values, principles, policies and actions?

We work with organizations that want to have meaningful, open and safe conversations that make a real positive impact.

**1:1 Support
Advice and Coaching**

**Meeting design and
facilitation**

**Facilitation skills
training**

Contact me to learn more about how I can help you!

 nancy@guidedinsights.com

 www.guidedinsights.com

