Understanding the Impact of Values on Organizational Culture

Paul D. Longenecker, RN, PhD
Graduate Faculty
Dept. of Health & Sport Sciences
Otterbein University
President/Lead Consultant
The Transformational Group, LLC

Objectives:

☐ Describe the findings of research on organizational values

☐ Outline the benefits and costs of creating organizational values statement

☐ Define a evidence-based plan for maximizing organizational value statement

Starting Point

Historical Perspective of Values Research

☐ General

☐ Health Care

☐ Hospice

Values Research

☐ A landmark values study by Milton Rokeach in the 1970's identified two key sets of values:

❑ Terminal – desirable end-states

❑ Instrumental – means to achieve terminal values

Values

Instrumental (process)	Terminal (outcome)
☐ Ambitious	☐ A comfortable life
☐ Cheerful	☐ An exciting life
☐ Courageous	☐ A world of peace
☐ Honest	☐ Family security
☐ Imaginative	☐ Freedom
☐ Independent	☐ Happiness
☐ Loving	☐ Pleasure
☐ Polite	☐ Salvation
☐ Responsible	☐ Wisdom

Core Values

☐ The values having the highest significance.

☐ Normally, defined as the **two** most important values.

☐ May be developed by bundling other values that encompass the core values.

☐ Define them may require paying "attention to your inner dialogue" to identify them (Center for Ethical Leadership, 2002).

☐ Are the values "that you would die for" (Author unknown)

Definitions:

Values

- "a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence" (Rokeach, 1973, p. 5).
- Defined belief system, judgment of right and wrong, hierarchy of importance
- Organizational – "the organization's essential and enduring tenets – a small set of guiding principles…" (Collins & Porras, 1997)

Professional Differences

- People within similar occupations or categories tend to hold similar values
- One study (Frederick & Weber, 1990) identified differences in terminal values
  - Executives – Self-respect, **Family security** & Freedom
  - Union members – **Family security**, Freedom & Happiness
  - Activists – Equality, A world of peace & **Family security**

Values and Personality

Although, values and personality type do not always match and actions may not always reflect values, **personality may help define occupational preferences.**

- Social   Sociable, friendly, cooperative
- Realistic   Shy, genuine, stable
- Investigative   Analytical, curious, independent
- Conventional   Confirming, efficient, practical
- Enterprising   Self-confident, ambitious, energetic
- Artistic   Imaginative, idealistic, emotional

(Holland, 1997)

Generation and Values

Generational value tendencies have been identified:

- Veterans (1925-1942) – hard work, duty, sacrifice, thriftiness
- Baby Boomers (1943-1960) – success, personal fulfillment, optimism, ambition, work efficiency, more is better
- Generation X (1961-1980) – uncertainty, personal focus, live for today, save, simplify, team oriented
- Millennials (1981 – today) – on my terms, just show up, earn to spend, follow directions, "what's next"

(Generational Cohort Theory)

Factors for Generational Differences

- Type of community that you grow up in
- Stability of the workplace
- Technology
- Economic environment
- Societal values during your upbringing (what was going on when you were 12 years old)
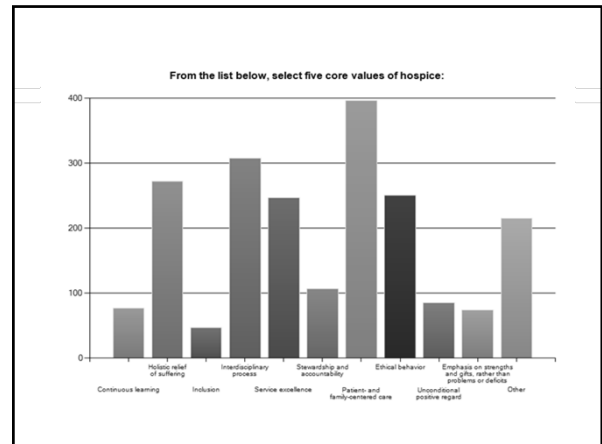
Health Care Values Research

- Very little health care specific research has been done.

Core Hospice Values (Organizational)

- Patient and family centered care
- Interdisciplinary process
- Holistic relief of suffering
- Ethical behavior
- Service excellence

NHPCO Survey 2007

From the list below, select five core values of hospice:

Hospice Values Research

- Evolved from prior studies by researcher:
  - Transformational Leadership Skills of Hospice Executives (2004, 2005)
  - Succession Planning Practices of Hospices (2007)
    - Challenge of Succession Planning/Personnel Development Plan – values of professionals entering hospice are different than in the past.
  - Core Values of Hospice Professions (2009, 2010, 2013)
    - Common values defined. No differences found based on demographic characteristics.
    - Meanings of common values defined.
    - Validation of meanings

Findings of Values Research in Hospice

- An area of commonality (92% of all responses):
  - Family
  - Faith
  - Love
  - Integrity
  - Peace
- An area of difference:
  - How hospice professionals define the values but not well defined by individual characteristics.
  - Organizational characteristics would appear to be an area of commonality

Summary of Research

- Values are highly research, just not in health care.
- Occupational similarities.
- In hospice, no demographic differences and limited definitions perspectives.

Benefits & Costs of Value Statements

Benefits	Costs
□ Common Ground	□ Competing Definitions
□ Shared Beliefs	□ Commitment to implementation
□ Culture of Fellowship	□ Need for Complete Organizational Involvement

Benefits

- □ Common Ground
  - ◘ Based on research, most hospice professionals have similar values
  - ◘ Foundation on which to build organizational culture
- □ Shared Beliefs
  - ◘ Based on research, most hospice professionals have similar definitions of values
- □ Culture of Fellowship
  - ◘ Although, diverse health care professionals work in hospice, their similarities are greater then their differences related to values. Differences based on job responsibilities not values.

Costs

- □ Competing Definitions
  - ◘ Similar values but different meanings
- □ Commitment to implementation
  - ◘ Resources to fully integrate in organizational culture
- □ Need for Complete Organizational Involvement
  - ◘ Values statement must match organizational practices (walk the talk).
  - ◘ Embedded in every aspects of organization

SO WHAT SHOULD WE DO WHEN CREATING VALUE STATEMENTS

Plan to Maximize Value Statement

- □ Identify the unique values of your organization

Core Values (Sample list)

- □ Peace
- □ Wealth
- □ Happiness
- □ Success
- □ Friendship
- □ Fame
- □ Authenticity
- □ Power
- □ Influence
- □ Justice
- □ Integrity
- □ Joy
- □ Love
- □ Recognition
- □ Family
- □ Truth
- □ Wisdom
- □ Status
- □ Faith

Plan to Maximize Value Statement

- □ Identify the organizational values
- □ Define the meaning of the selected values
- □ Integrate the values and definitions into ALL organizational practices
  - ◘ Hiring
  - ◘ Care delivery
  - ◘ Community outreach
  - ◘ Employee promotions

QUESTIONS

Contact Information:

Paul D. Longenecker, RN, PhD
Graduate Faculty
   Dept. of Health & Sport Sciences
   Otterbein University
President/Lead Consultant
   The Transformational Group, LLC
plongenecker@otterbein.edu
   614-823-1083 (office)
   419-322-0609 (cell)