

Tools you can use...

Core Values Self-Assessment

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Introduction

This tool is based on the Core Values model introduced in my [LinkedIn newsletter article](#) (November 8th, 2022.) I described five values that address the 'being' side of personal performance. They underscore the importance of 'being' one's best as the necessary foundation for 'doing' one's best.

These five values, identified through extensive research and validated through experience, are a central component of a highly successful leadership development program now in its twenty-fifth year. They function like a 'compass' by which we steer our actions... the 'doing' side of personal performance. Regular evaluations of the program clearly demonstrate that they are essential building blocks for developing and sustaining a healthy professional and personal life.

How This Assessment Works

The Core Values model provides a framework within which you can reflect on important truths about your own performance. The fruit of this search will be deeper insight into what currently steers your actions, and a wealth of opportunities for engaging in deep change. You'll know the answer to this fundamental question: ***Who Am I Being While I'm Doing What I'm Doing?***

The Process

This assessment is a guided reflection of these five 'Core Values.' You'll assess how well you are currently applying each, identify practical improvements, and reflect on the potential benefits of implementing those changes.

You'll need note-taking tools for this process as you assess yourself on the Core Values and reflect on important changes you can make to improve the 'being' side of your performance.

When you're ready to complete the assessment, check out the next page!

Core Values Self-Assessment

How to Conduct a Core Values Assessment...

Part I: Assessing Current Reality

Rate how well you're currently applying each of the five core values across all areas of your life. If you sense there are differences between major areas of your life, you should assess them separately.

Accountability: Intentionally seeking feedback & guidance from trusted sources, and acting on it

5 (Excellent) 4 (Good) 3 (Fair) 2 (Poor) 1 (Terrible)

Balance: Living a balanced life consistent with your priorities & commitments to yourself and others

5 (Excellent) 4 (Good) 3 (Fair) 2 (Poor) 1 (Terrible)

Interdependence: Effectively collaborating with others to support each other's success

5 (Excellent) 4 (Good) 3 (Fair) 2 (Poor) 1 (Terrible)

Empowerment: Investing in others' development to bring out the best in their performance

5 (Excellent) 4 (Good) 3 (Fair) 2 (Poor) 1 (Terrible)

Leverage: Making strategic decisions & plans to maximize the potential for breakthrough change

5 (Excellent) 4 (Good) 3 (Fair) 2 (Poor) 1 (Terrible)

Part II: Planning & Implementing Healthy Change

Now comes the hard work of reflection... hard because it challenges us to be honest with ourselves about where we are falling short in 'being' the people we want – and claim – to be. It's not easy to admit to our shortcomings. But, on the other hand, it's the most reliable way to commit ourselves to learning, growth and healthy change. So, for each of your ratings, reflect on these three questions.

- 1. Insights:** What does your self-rating on this value suggest about how it contributes to your success or failure in key areas of my life. How does that impact your results and impact?
- 2. Changes:** What practical steps could you take to apply this value more effectively in key areas of your life. What 'high-leverage' changes would make the biggest positive impact?
- 3. Action Commitments:** What actions are you committed to taking, starting now, to implement the changes you believe will make the biggest difference?
- 4. Identify who will you invite to be your accountability partner to support you in this?**
- 5. Invite them today...** share your commitments and plans, why these changes are important, and plan for regular updates and ongoing reassessment!