

Organizational Culture Assessment Instrument

Theory and Tool

plus the OCAI online products and services



OCAI online

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Why work with Culture?

Why do organizations invest in organizational culture? Culture influences organizational performance, innovation, agility, engagement, recruitment and retention, and competitiveness.

Kotter and Heskett found that effective culture can account for 20-30 percent of the differential in corporate performance when compared with “culturally unremarkable” competitors.

Professor Kim Cameron showed that a positive climate, positive relationships, communication, and positive meaning lead to “positive deviance” or high performance.

Christine Porath and Christine Pearson did a study with 14,000 respondents and found that incivility demoralizes people. The estimated loss of productivity per year per employee is \$ 14,000 on average. Bill Sutton (Stanford University) has suggested that productivity could decrease by 40% when workers experience bullying.

Summarized: a toxic culture decreases productivity with 40%, incivility as part of culture damages productivity with \$14,000 per employee per year, while an effective culture increases productivity with 20%, and a positive culture boosts results by 30-40%

“ I want to pass on my personal thanks for your speedy and highly professional analysis of my surveys.”

*—Dr. Brian Armstrong,
Co-Director of Unscheduled &
Acute Care, Belfast Health
& Social Care Trust*

Culture is also often the reason why 70 percent of all mergers, acquisitions and organizational change projects fail.

Thus, culture is not as “soft” as prejudice would have it. It produces hard results.

The Organizational Culture Assessment Instrument (OCAI, © Kim Cameron) is a validated tool for assessing organizational culture, developed by Robert Quinn and Kim Cameron at the

University of Michigan. As people are often not aware of the culture, the OCAI helps people and organizations notice their current culture and see what they would change.

The OCAI survey is based on the Competing Values Framework: one of the most used and useful frameworks; by over 10,000 companies in 30 years (ten Have, 2003).



It is well-researched and validated, but also compact with six aspects that reliably represent an organization's culture. It's a quick culture survey that can be done in 15-20 minutes online, in 19 different languages. Let's look at its theory first.

The Competing Values Framework

The Competing Values Framework (CVF) emerged from research to identify the organizational effectiveness criteria (Quinn & Rohrbaugh, 1981). The criteria that were found to make a difference are the dimensions internal-external, and stability-flexibility.

An organization might have an internal orientation; focusing inward on development, collaboration, integration of activities, coordination. Or it might have an external orientation; looking at the market, what's possible with the latest technology, what competitors are doing, what customers want, and it could diversify activities as a result.

Both internal and external attention is needed to be successful in the long run - but depending on their environment an organization will have a dominant preference. An agile, volatile market calls for an external orientation whereas a stable environment allows an internal focus.

Note the “competing” nature of the values: you have to choose whether you look inside or outside - you cannot do both at the same time.

The second defining dimension is the focus on stability or flexibility — organizations that prefer to organize for stability value clear structures, planning, budgets, and reliability. They assume that reality can be known and controlled. Organizations that organize with flexibility assume the opposite: you can never predict and control everything. They prefer a flexible attitude and organization to adapt quickly to changing circumstances - focusing more on people and activities than on structure, procedures, and plans.

The “competing values” nature of stability and flexibility prevents you from doing both at the same time. Organizations can spend their money, attention, and time only once, so they tend to emphasize certain values. Quinn and Cameron found that flexible organizations are most effective, which sometimes leads to contradictory behavior. The “best” organizations use all four value sets when necessary.

A culture type works best in the activities domain that aligns with its values. In the health care sector, for instance, we often see Collaborate or Clan culture.



Beware: there is no ultimate “best” organizational culture prescribed by the Competing Values Framework. The model is descriptive - not normative. In a specific domain or market, one culture type might fit better than another, and this is for the organization to decide. “When would be at our best?”

When you map those two polarities in a 2x2 matrix, you see four culture types emerge:

CVF	Internal orientation	External orientation
Flexibility	Collaborate or Clan Culture	Create or Adhocracy Culture
Stability	Control or Hierarchy Culture	Compete or Market Culture

The Competing Values Framework is validated by a lot of research (Denison, 1990; Howard, 1998; Deshpande & Farley, 2004). It is aligned with other dimensions that describe how people behave when organizing (Linnenluecke, 2010; Ralston, Tong, Terpstra, Wang & Egri, 2006; Cameron & Quinn, 2006).

These underlying dimensions of organizing exist in all human and organizational activity. It aligns with the four biological determined drives in the brain: the need to bond, to learn, to acquire, and to defend. (Paul Lawrence, Nitin Nohria, 2002).

“ The usefulness of the OCAI and the ease with which our clients can understand the data makes this a perfect instrument to use. The vendor is super-responsive. I love using this instrument and appreciate all the care we are given.”

—Judith Schechtman, Senior Consultant, Triangle Associates, USA

The CVF and OCAI can also be related to the “Big Five” personality traits, the MBTI, and the four psychological types discovered by Carl Gustav Jung.

Because of this conceptual “archetypical” basis, the Competing Values Framework can integrate many other tools on leadership and change.

This scientific basis is excellent but what is best is its practical applicability. The CVF helps you see what people value and emphasize when they organize activities, whether they are in a for-profit organization, a sports club, local community, or a family. The framework shows where you are and where you’d like to go.



The Organizational Culture Types

Mapping those two dimensions of “competing values” you get four culture types: the dynamic, entrepreneurial Create Culture, the people-oriented, friendly Collaborate Culture, the process-oriented, structured Control Culture and the results-oriented, competitive Compete Culture. Also known as Adhocracy, Clan, Hierarchy and Market culture (Cameron & Quinn).

Create Culture (Adhocracy Culture)

This is a dynamic and creative working environment. Employees take risks. Leaders are seen as innovators and risk takers. Experiments and innovation are a way of bonding. Prominence is emphasized. The long-term goal is to grow and create new resources. The availability of new products or services is seen as a success. The organization promotes individual initiative and freedom.

- ◆ Do new things: create, innovate, envision the future
- ◆ Transformational Change
- ◆ Handle discontinuity, change, and risk
- ◆ Freedom of thought and action, rule-breaking
- ◆ Thoughtful experimentation, learning from mistakes, failing fast
- ◆ Roles like entrepreneurs and visionaries
- ◆ Visionaries inclined toward risk, not afraid of uncertainty

Typical in sectors like technical start-ups, technology-driven industries (communications, sustainability), but also disruptive services like Airbnb, Uber.

Collaborate Culture (Clan Culture)

This working environment is friendly. People have a lot in common, and it feels like a large family. The leaders are seen as mentors or maybe even father figures. The organization is held together by loyalty and tradition. There is great involvement. They emphasize long-term Human Resource Development. Success is defined within the framework of addressing the needs of the clients and caring for the people. The organization promotes teamwork, participation, and consensus.

- ◆ Do things together: build teams, people matter
- ◆ Long-term Change
- ◆ Commitment, empowerment, cohesion, engagement
- ◆ Human development
- ◆ Collective wisdom, long-lasting partnerships, and relationships
- ◆ Roles like a mentor and a coach
- ◆ Wary of conflict



Typical in sectors like health care, education, some government agencies, not-for-profits.

Control Culture (Hierarchy Culture)

This is a formalized and structured workplace. Procedures direct what people do. Leaders are proud of efficiency-based coordination and organization. Keeping the organization functioning smoothly is most crucial. Formal rules and policies keep the organization together. The long-term goals are stability and results, paired with efficient and smooth execution of tasks. Reliable delivery, continuous planning, and low cost define success. Personnel management has to guarantee work and predictability.

- ◆ Do things right: eliminate errors
- ◆ Incremental Change
- ◆ Attention to details, careful decisions, precise analysis
- ◆ Increase consistency and reliability, well-informed experts
- ◆ Better processes and efficiency, routines
- ◆ Roles like organizers and administrators
- ◆ Conservative, cautious, logical problem solvers

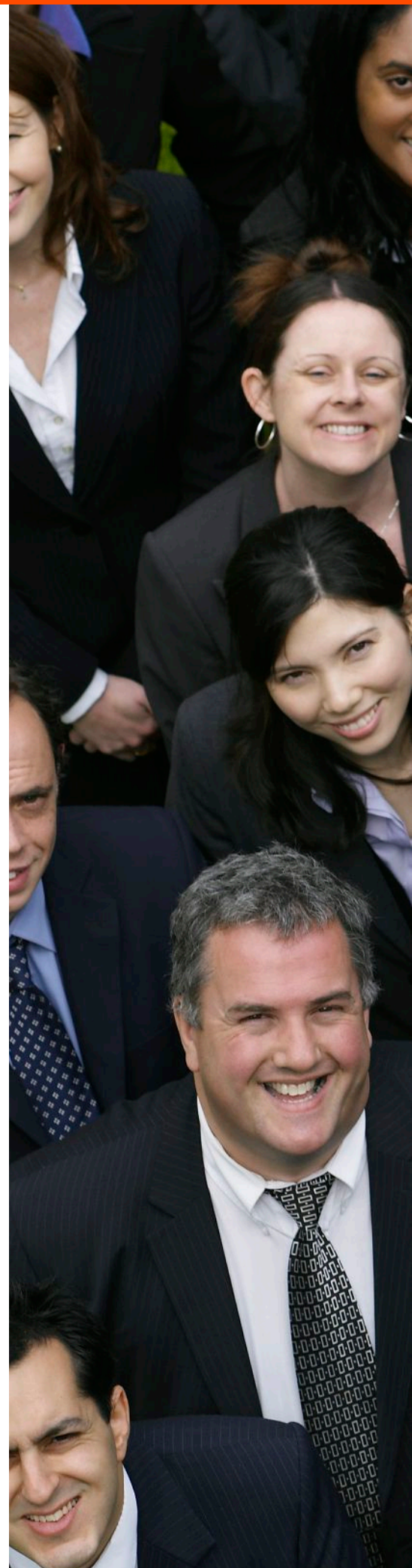
Typical in sectors like medicine, nuclear power, military, government, banking and insurance, transportation.

Compete Culture (Market Culture)

This is a results-based workplace that emphasizes targets, deadlines, and getting things done. People are competitive and focused on goals. Leaders are hard drivers, producers, and rivals. They can be tough with high expectations. The emphasis on winning keeps the organization together. Reputation and success are the most important. Long-term focus is on rival activities and reaching goals. Market dominance, achieving your goals, and great metrics are the definitions of success. Competitive prices and market leadership are important. The organizational style is based on competition.

- ◆ Do things fast: compete, move fast, play to win
- ◆ Fast Change
- ◆ Customer satisfaction, attack competitors, shareholder value
- ◆ Speed: results-right-now, getting things done, achieving goals
- ◆ Acquire other firms, outsource selected processes,
- ◆ Deliver results, make fast decisions, solve problems
- ◆ Leaders are hard-driving, directive, commanding, demanding

Typical of sectors like consultancy, accountancy, sales and marketing, services, manufacturing.



The OCAI Assessment

The OCAI (© Kim Cameron) was carefully designed, tested, and validated. Respondents are asked to score six aspects of culture:

1. Dominant characteristics
2. Organizational leadership
3. Management of employees
4. Organization glue
5. Strategic emphases
6. Criteria of success

“ A huge thank you to OCAI online for managing and delivering our culture reports against the odds! Your support and insight were extremely valuable”.

—Johan de Goede, consultant,
The Human Route, South-Africa

For each aspect, they must divide 100 points over four statements. They assign the most points to the statement that is most true, and the least or none to the statement that doesn't fit with their organization.

The first round of scoring the six aspects yields a profile of the current culture. Quinn and Cameron found that most organizations have developed a dominant culture style. An organization rarely has only one culture type. Often, the culture

profile is a mix of the four organizational culture types.

The second round focuses on the preferred organizational culture in the future. The gap between these two profiles shows the desire for and direction of change.

This way of scoring is deliberately designed. By dividing 100 points over four statements, respondents have to weigh and choose in the Competing Values Framework. In reality, you can't have everything maximized at the same time. A Likert-scale would allow people to give all statements a 1 or a 5 - while this way of weighing points is more realistic.

The six aspects are based on extensive research. Adding more variables does not enhance the survey's validity. Hence, the survey is short and sweet while it yields a valid representation of culture. (If you want to know more about validity and reliability, please see the book by Cameron & Quinn: *Diagnosing and Changing Organizational Culture*).



By averaging all OCAI profiles, we can calculate a collective team or organization profile to get an overview of current and preferred culture. It's insightful to compare the culture profiles of departments, locations, levels, or professions within one organization.

In smaller teams, you may have time also to compare the individual profiles.

Your OCAI culture profile shows:

- ◆ The dominant current culture
- ◆ The discrepancy between the present (fuchsia area) and preferred culture (blue)
- ◆ The strength of the current culture
- ◆ The strength of the preferred culture
- ◆ The proposed change: in what direction?
- ◆ People's current "pain" and the "gain" of change in the desired direction



	current	preferred
Clan	17.08	33.10
Adhocracy	22.70	29.01
Market	30.96	19.32
Hierarchy	29.26	18.57
Total	100	100



The results report also shows the congruency of the six culture aspects. Are they aligned or not? If the six culture aspects emphasize different values, people may be confused, frustrated, and conflicts could ensue. Cultural incongruence often leads to a desire to change, because different values in different areas compete with each other.

Six reasons to use the OCAI online

1 Validated & quantified

Start with a validated, quantified profile of current and preferred culture types.

2 Quick & Focused

OCAI looks at 6 key aspects of culture: as short as possible but validated.

3 Share & Engage

No charge per person: invite everyone! Organizational change needs associates.



4 Develop Dialogue

Apply our approach to work with the assessment results and engage people.

5 Change what Matters

Focus on behaviors that make the difference and change what matters.

6 Make Change Last

Change Circles help people to support each other and persevere.

The Culture Change Process

The OCAI provides a validated, visual and quantitative profile of current and preferred culture. It's a very insightful map for the journey toward the best possible future culture.

To change or improve the culture we need to make it “operational” and translate the culture to daily behaviors in your organization. Once you understand the current values, beliefs, and “the way we do things around here” you’ll discover what needs to change to move toward the desired future.

“OCAI online’s team was responsive and flexible, service was personal and support materials were outstanding. Every step of the process was outlined clearly so I felt like I had a compass to direct me to where I needed to go next in terms of navigating the online process and making good use of the results.”

—Linda Watt, Director
Learning & Development
& Consulting, University of
Guelph, Canada

In this process, generic advice is not useful. As every organization is different, it’s important to understand the typical details of your culture and to customize your change efforts.

We recommend working with Marcella Bremer’s book “[Organizational Culture Change](#)”. You organize an OCAI Workshop or Change Circle per (executive) team to work with the OCAI results. This approach is also explained in the OCAI Work Kit that you can download with your online assessment. Our work kit helps you to facilitate the culture change process.

Also, benefit from Marcella Bremer’s book “[Developing a Positive Culture](#)” that offers Interaction Interventions and team practices to develop a (more) positive and productive culture.



Culture Change Process Outline

1. Online Organizational Culture Assessment Instrument
2. OCAI Workshop, Culture Focus Group, or Change Circle
3. Recurring Change Circles/meetings to sustain the changes
4. E-learning as support for your onsite culture change process

1. Online Organizational Culture Assessment Instrument

Your team or organization assesses the current and preferred culture with the online OCAI.

2. OCAI Workshop, Culture Focus Group, or Change Circle

In an OCAI Workshop (name it as you like) you work with your OCAI assessment results to:

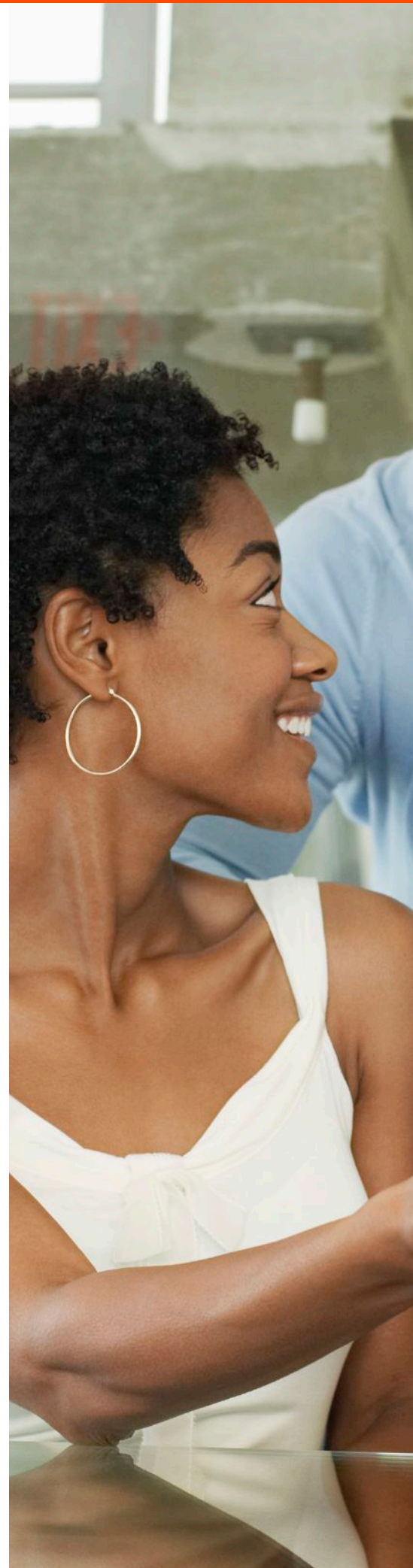
- ◆ Understand the quantified culture profile
- ◆ Specify current culture
- ◆ Reality check of the desired culture
- ◆ Specify preferred culture
- ◆ Develop a How-to-change plan

In an OCAI workshop or Change Circle, participants discuss the culture. They translate culture to daily behaviors for managers, engineers, front desk staff, factory workers, and so on. Participants develop a change plan per team to move toward the new culture, take ownership and start doing the new behaviors with mutual support. The OCAI Work Kit offers a manual, workshop schedules, exercises and presentation slides to go through this process.

“ My time is valuable, the OCAI frees-up the time it takes to administer and tabulate the individual surveys. I appreciate the quick set-up of the online assessment. Participants get immediate feedback on their own survey and this increases curiosity. The information OCAI provides will help people make informed decisions.”

—Rodney Slaughter, MSOD,
Organizational Consultant, USA

Why would you bother to invite associates to culture workshops? Because you cannot order people to change their beliefs and behaviors in a top-down way. Top-down may seem fast but often evokes resistance or fake compliance. When you spend this time at the beginning of the change process, you save time in the end and set your organization up for success.



The OCAI helps to build employee engagement: people become aware of culture, see how they contribute to the culture and are invited to co-create the change in their team.

In this process of culture meetings, you'll build trust and solve objections and doubts together. This will enhance commitment. Working with information from all levels, you'll even improve the overall change plan.

The OCAI workshops lead to:

- ◆ Qualitative, customized insights and consensus of culture
- ◆ Information from all positions and perspectives, thus: better changes to implement
- ◆ Commitment to change (provided that you seriously work through objections)
- ◆ Engagement and ownership
- ◆ This Change approach helps to develop successful, sustainable change.

But is it feasible? Absolutely! You can organize workshops per team or organize open-enrollment workshops for anyone who's interested in the culture.

You can roll out from the top down, starting with the top executives, followed by all other teams. Everyone works to make culture operational and customizes their change plan for the team within the boundaries outlined by the top executives.

Or work with people who volunteer for the workshops, from all levels and departments. They create their personal change plan and become the ambassadors of change. You leverage the network nature of organizations with this Change approach.

You can read more about the one-day [OCAI Culture Workshop](#) here.

3. Recurring Change Circles/meetings to sustain the changes

People also need perseverance. OCAI teams or Change Circles offer mutual support while practicing new behaviors and interventions. After the first OCAI-workshop, people might convene every 2-4 weeks to keep the change going and adjust plans if needed.

Some teams use the first 30 minutes of regular meetings to check in on culture behaviors. What matters is that you keep working with culture. You'd better shape the culture - or it will shape you.

4. E-learning added to your onsite culture change process

Culture change requires collective learning. A critical mass of orga-



“ The OCAI provided valuable insights, allowing us to have a comparative review of the various organizations that make up our corporation. The tool helped provide a better understanding of the different culture types at various locations, and supported our culture transformation by informing us of where we are today and where we want to be in the future. OCAI Online’s team was helpful and responsive and we benefited from the online video calls, which supported our learning around culture and possible ways to proceed.”

—Joshua J. Troutwine,
Director of Human Resources
– Operations/Logistics, at
Hillenbrand corporation, USA

focus groups. This helps busy professionals to develop an effective culture that will become the “new normal.”

Check out the curriculum and see how the [Positive Culture Academy](#) for teams can leverage your organizational culture change process.

OCAI online products and services

OCAI online helps leaders, managers, Organization Development consultants, Change facilitators, and HR professionals to assess the culture and engage in organizational culture change.

nization members must change how they think, what they value, and how they interact and act - or not enough will change in daily reality. Culture change does not happen on paper!

That’s where the online Culture Academy can help. Based on easy-to-do positive “interaction interventions,” leaders and team members alike learn how to develop the culture to be more positive and productive.

Each module explains more about culture and positive (self-) leadership, offers tools, and invites people to customize and apply them on the job.

People are enticed to take ownership and action, and to change “the way we do things around here.” It’s great for successful change, engagement, and leadership development. As research shows, when someone learns from, interacts with, and has an impact on the real world in real-time, higher retention of new learning occurs.

E-learning can blend in with your in-person workshops and culture



We provide the OCAI tool online to check and change the culture. Our services include the online OCAI survey with do-it-yourself Work Kits, video training, books, workshops and consulting. Our partner consultants offer onsite facilitation in many locations. Our Positive Culture Academy adds e-learning to your onsite culture meetings to make the change process easier.

OCAI Assessment Products

OCAI One: Free

Available for students.

- ◆ Sign up for the English trial version to see how the validated OCAI works.
- ◆ Get your personal profile with a short explanation.
- ◆ Receive updates about culture via our mailing list.
- ◆ Try before you buy a Pro or Enterprise assessment.

OCAI Pro: One Price

For consultants, leaders, and associates.

- ◆ Assessment for teams or organizations with a collective culture profile for current and preferred culture.
- ◆ Download the results report and the OCAI Kits to work with the results.
- ◆ Fixed price, regardless of the number of participants.
- ◆ Set up and buy online within minutes.
- ◆ Available in 19 languages.
- ◆ No commercial offers and no mailing list subscription.

OCAI Enterprise: Price Varies

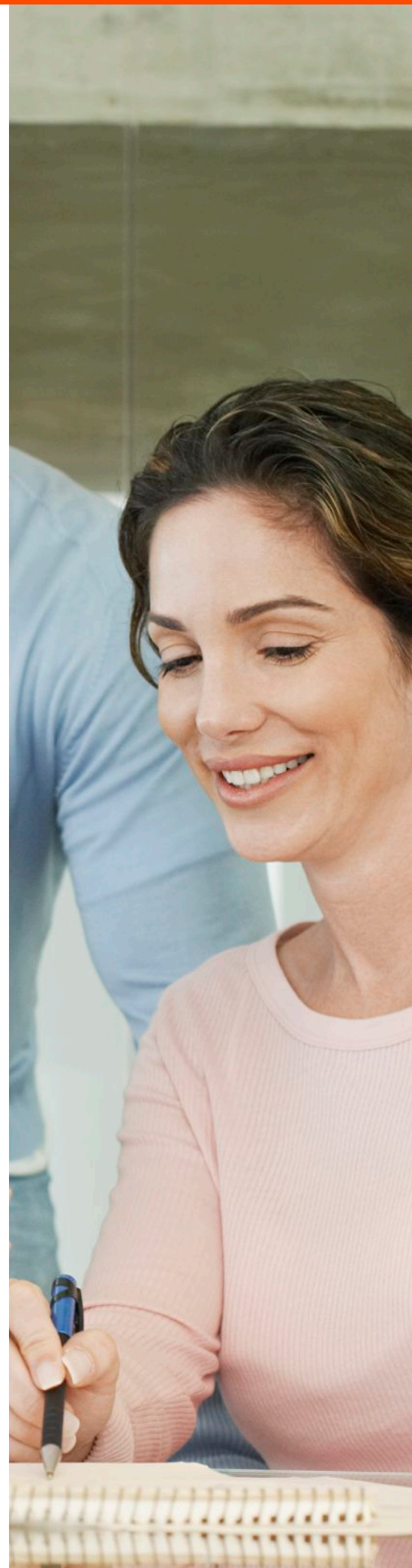
For consultants, leaders, and associates.

- ◆ Get the collective profile plus sub-profiles of your choice to compare departments, locations, levels, or other demographics.
- ◆ Receive the results report and the OCAI Kits to work with the results.
- ◆ Price is based on the number of sub-profiles, regardless of the number of participants.
- ◆ Set up, buy online and invite respondents by email.
- ◆ Available in 19 languages.
- ◆ No commercial offers and no mailing list subscription.

OCAI Training and Consulting

Online OCAI video training

For students, leaders, and consultants. How to work with the OCAI plus extras. For external consultants: you can become an OCAI affiliate upon completion.



Culture, Change & Leadership certification workshop

For leaders and consultants. In-depth workshop with open enrollment about facilitating culture change and positive leadership practices. For external consultants: you can become an OCAI partner when you attend this residential workshop.

We can also offer this workshop in-company, for your leaders or internal consultants and [HR professionals](#).

OCAI Workshop based on your OCAI results

We can facilitate your workshop about your OCAI profile or train your professionals to facilitate the culture workshops in your organization.

Online or onsite consultancy

We can assist you with consultancy online or in-person. You can use our services or engage one of our partner consultants.

Positive Culture Academy: individual enrollment and In-company

Interactive e-learning about developing a positive, productive culture and leadership style with video lectures, assignments, video calls, and consulting.

Books

Organizational Culture Change, by Marcella Bremer

Unleash your organization's potential in circles of 10. The practical How-To book stuffed with real cases!

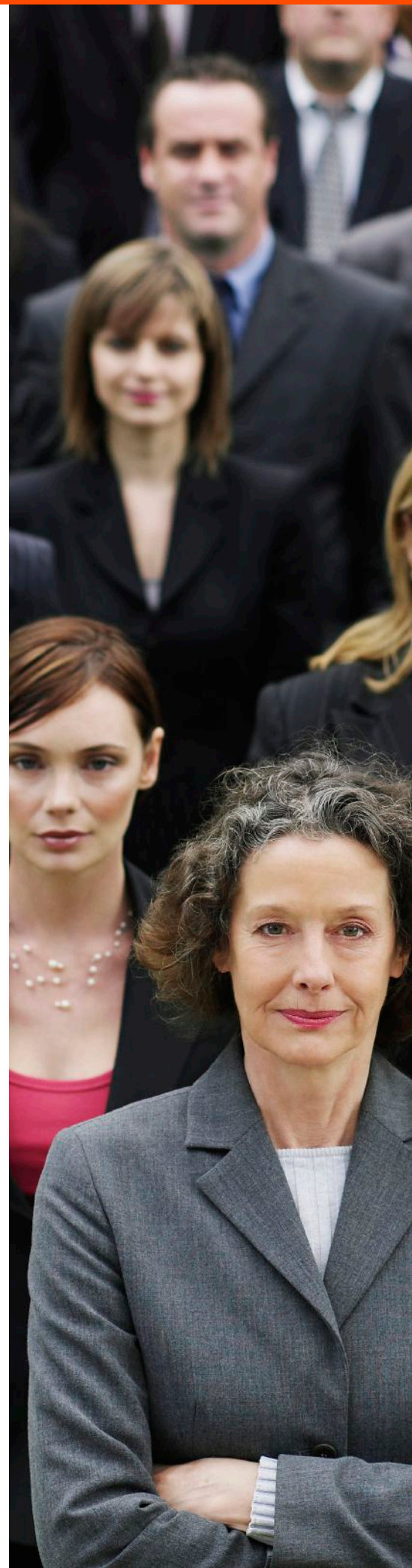
Developing a Positive Culture where People and Performance Thrive, by Marcella Bremer

This pragmatic and well-researched book focuses on how to develop a positive culture with Interaction Interventions or Change Circles.

About OCAI online

OCAI Online is founded by Marcel Lamers MSc. , and Marcella Bremer MScBA. We're consultants based in Europe and working worldwide. With the local OCAI-team and our partner consultants all over the world, we help you develop your workplace culture. The copyright of the OCAI belongs to professor Kim Cameron.

Over 100,000 respondents (update May 2019) from numerous organizations have worked with OCAI Online: using the free or paid OCAI surveys, the work kits, the video training, the book and/or our



consultancy.

Our clients are leaders or associates of organizations, consultants working with clients, and students. Our client organizations are located all over the world and vary in size from small startups to super large global corporations and every size in-between. Almost all industry sectors are covered which makes our database interesting for research.

What if you worked in a positive and productive workplace? You and your team would engage (more), innovate, contribute, and be at your best! Positive organizations are agile, more innovative, competitive, collaborative and productive.

Are you ready to develop your (client's) culture?

1. Start your OCAI Assessment online, and/or the training and consulting of your choice.
2. Yes, but - you have questions? [Email](#) us.