

## Facilitating Values Workshet

Adapted from Robert Gass

*This is the 5th article of 5 in the Visioning Toolkit series.*

You can download the articles in this series, and other tools, at:  
<https://atctools.org/wp-content/uploads/toolkit-files/visioning-toolkit.pdf>

Visioning = Mission + Vision + **Values**

Core values are the fundamental principles by which organizations live and fulfill their Mission and Vision.

Many organizations have lists of values on their website or in their annual report.

But, few of these organizations have core values that are actually used as active tools to shape organizational culture, inform all major decisions, and guide its destiny.

Articulating the core values of an organization is about discovery – not invention. It's not about writing lists of the values people think their organization should have. The values “creation” process is about uncovering and giving voice to those true values that already exist in the organization, that are the soul and essence of its greatness.

*“Before you tell your life what truths and values you have decided to live up to, let your life tell you what truths you embody, what values you represent.” – Parker Palmer, Let Your Life Speak*

### The Process of Articulating Values

We typically guide groups through the following three steps:

**Step 1.** Generate the list of core values

**Step 2.** Define the values

**Step 3.** Translate the values into behavior

## Step 1: Generate the list of core values

- Individuals separately generate their own list of the organization's core values.
- Small groups cluster and work to reach agreement on their shared list of values.
- Depending on the size of the group, there may be report-outs and other steps to synthesize the final list of values.

At this point, there will be a list that looks something like:

- Justice
- Courage
- Respect
- Collaboration
- Accountability

This is a good start, but these 5 words, while lovely, are generic and undefined. Different people will likely have very different understandings of what these words mean. Justice might mean one thing to a group working on the school-to-prison pipeline, but something altogether different for a group pushing to hold accountable Wall Street violators of ethics laws.

## Step 2: Define the Values

For values to be meaningful and useful, they must be defined specifically in the context of the organization's Mission.

The above list of values actually comes from OneAmerica, a Seattle-based organization whose **Mission** is:

To advance the fundamental principles of democracy and justice with a particular focus on building power in immigrant communities.

Here's how OneAmerica defined their **Values** as they relate to their Mission:

- **Justice:** Ensuring equal access to power and opportunity, supporting and defending the rights of all people, and eliminating discrimination and oppression.
- **Courage:** Standing up to power, speaking truth, challenging injustice and acting with conviction and integrity.
- **Respect:** Listening to, acknowledging and valuing multiple perspectives and positions, and fostering understanding and empathy through dialogue.
- **Collaboration:** Providing opportunities for diverse groups to come together, be heard and take collective action.

- **Accountability:** Adhering to our mission, vision and values in an approachable, inclusive and transparent way.

### Step 3: Translate the values into behavior

The final step in values work is to test how the values might play out in daily organizational life. What behaviors would we expect and support, and what behaviors would be inconsistent with our values?

For example, for the value of courage we might expect to see behaviors like:

- Being willing to disagree or question those with more power when you believe it's in the organization's interest to do so.
- Step up to make hard choices.
- Raise questions and valid concerns around power and privilege in the organization.
- Go directly to people with interpersonal issues that impact work.

Some examples of behavior not in alignment might be:

- Hanging back and watching things unfold rather than voicing an idea or opinion that may be unpopular.
- Not being forthcoming about your mistakes or failures.
- Complaining about others rather than going to the person.

In case it's not clear, Values are meant to guide both the internal culture and external work of organizations.

For example, one of the values of the Southern Coalition for Social Justice is:

*Eliminating structural inequality.*

And one of their explicit behavioral descriptors is:

*We do not represent people in routine divorce cases or handle traffic tickets, unless, for example, there are racial profiling issues.*

Use this table to list core values, their definitions, and the translated behaviors.

Core Value	Definition	Behavior

## Tips for Facilitating Values Work

Working on values has a different feel than the upbeat, expansive energy of dreaming a Vision. People need to be thoughtful, taking care with the words, more willing to stop to clarify, and more willing to lean into nuances and disagreements.

Here are some best practices:

### 1. Test core values

Make sure the values are really core values. Here are some of the tests suggested by Jim Collins<sup>1</sup>, co-author of the classic book *Built to Last*.

<sup>1</sup><http://www.jimcollins.com/tools/vision-framework.pdf>

- Would you want your organization to continue to hold fast to this core value, even if it was detrimental to its finances?
- Would you want the organization to stand for this core value 50 years in the future, no matter what changed in the external environment?
- Would you want your organization to hold this core value, even if at some point in time, it became a competitive disadvantage – even if in some instances, the environment penalized the organization for living this core value?
- Would you leave this organization rather than give up this value?
- Should individuals who do not share this value, and violate it consistently, not be a part of this organization?

*“If you don't stick to your values when they are being tested, they're not values – they're hobbies.” – Jon Stewart*

### 2. Encourage clarity and real agreement

In Values work, we want to make sure each word is the right word and that people agree what it actually means. Groups frequently back away from potential disagreements, or decide prematurely that things have been sufficiently hashed through. If used well,

Values will be brought out again and again for guidance at critical junctures in the life of the organization. They may need to inform diverse people in remote locations.

So, the exact words of a value statement are very important.

### 3. Push for real choices

There is a tendency in this process to avoid making real choices by:

- Creating too many core values. Experts generally recommend 5 values as a maximum, but definitely no more than 7. (Research has shown seven to be the maximum amount of different items we can hold in working memory.)
- Trying to include too many suggestions by stringing a number of values together with conjunctions.

### 4. Set the stage for follow-up

At every step of the process, reinforce the expectation that these values are going to be an important part of the organizational culture. Follow-up steps typically include:

- Ongoing work to translate the values into practicable behaviors.
- Continued engagement and learning about the values and what they mean. For example: choosing one value each month to discuss and study.
- Building in accountability, such as:
  - evaluation of teams regarding their implementation of the values
  - feedback to individuals
  - making the values part of performance evaluations, etc.

### Going forward

You can't get people to "buy in" to values. People are predisposed to certain values or not. To build a robust values-based organization, you must attract and retain those people who are aligned with the organization's Core Values, and ultimately let go of those who are not.

Everything else in an organization may change or evolve over time – strategies, systems, policies, structures, even the Mission – but Core Values endure.

Values are the essence, the very DNA of an organization, and the key to its greatness.

*"Life is a series of compromises. And compromise is all right, as long as your values don't change."* – Jane Goodall