

## Values Statements – Samples

### **Definition**

An organization's culture can be defined as the patterns of values and assumptions that affect how people interpret events and how they behave relative to those events. An organization's culture, values and ethics influence behavior and decision-making. Every organization has a culture whether it is attended to or not. It exists and can be a force for generating positive or negative energy for the staff, board and volunteers. It reflects the values of those members (i.e., board, staff and volunteers) whether they are the same or different. When attention is devoted to defining and integrating an organization's culture and values, it can leverage people's commitment and support. A well-developed organizational culture and articulated set of values helps a healthy organization attract and retain people and keep their energy focused on the organization's mission and vision. An organization's values go beyond those that are mission-oriented and include work-related values (such as honest communication, respect, and inclusiveness).

### **Your Organization's Development of Materials**

Organizations do not need to have written values statements. If a written values statement will serve as a means of inspiring staff, board and volunteers and make decision-making easier, the organization should consider developing a written values statement.

One process for developing a values statement is to have the individuals involved (e.g., board members, staff, managers) outline the values they see currently in the organization and the values they would like to see present. Individuals are asked to outline both the organization's current and ideal values primarily to get a sense for whether or not there is a large distinction or gap between the two.

The process of articulating the two sets of values can begin with individuals working independently, writing down what they see as both existing and desired values. Next, in small randomly selected groups, people share this information, and as much as possible, attempt to reach consensus on the list of current and ideal values. Then, the small groups report their lists to the full group. In most organizations, this process will result in a long list of ideal values. A facilitator should then group the words into categories. Frequently at this point, the words from differing small groups will be similar but not identical (e.g., hard work versus dedication).

After the large group has reviewed the list, the facilitator should lead a discussion on each value, discussing what the value means for the organization, how present the value currently is, and how you would know if the value was fully present (i.e., examples of behavior consistent with the value). Depending on the size of the group and the number of values initially articulated, this additional work might be better done in small groups. If the discussion occurs in small groups, representatives from the small groups should report back to the large group on their work.

From this point, it is usually best if a Task Force refines the values into a statement that outlines both the organization's desired values and their significance. The report from the Task Force can then be circulated to everyone involved in the initial development for review and comment.

The process outlined above is only one of many ways that an organization can facilitate the development of a values statement. For more information or examples, feel free to contact The Oertel Group.

### **Processes of Integration and Institutionalization**

An organization's culture, values and ethics should be reviewed as part of a strategic planning process. If values are a way of reinforcing the organization's culture, then they should be articulated regularly through the day-to-day work of the organization. Additional means of reinforcing an organization's culture and values include case studies as part of in-service training, and signage and referencing in welcome letters. The very vocabulary of the organization should regularly incorporate values

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language. It can also be helpful to incorporate questions that relate to an organization's values into the hiring process for new staff members and the recruiting process for new board members. Organizational values should also be covered during the initial employee orientation.

### **Listing of Samples**

1. Marjoree Mason Center, Values
2. STAND! Against Domestic Violence, Value Statements
3. Interface Children Family Services, Letter from the President & CEO with Values
4. Tri-Valley Haven, Values Wheel

### **Marjoree Mason Center Values**

- We value diversity and the right of every individual to dignity and respect.
  - We value ethics in all of our business and personal relationships.
  - We value Quality-of-Care in whatever services and programs we provide.
  - We value inclusion, collaboration and partnerships with others.
  - We value creativity, problem solving and thinking outside of the box.
  - We value our shared vision for the future, our collective mission statement, and adherence to our philosophy to guide us in making the best decisions possible in building a healthier community for us all.
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## **STAND! Against Domestic Violence** **(formerly Battered Women's Alternatives)**

### **Value Statement**

**The following Value Statements serve as the foundation and guide for both the work that we do, and the ways in which we do it:**

Qualities of character that we strive to exemplify in our work, and in ourselves, include mutual respect, dignity, integrity, professionalism, and a belief in the equal worth of all human beings.

Safety, both physical and emotional, is perhaps the simplest way to express our organization's reason for being. The safety of our clients and ourselves is an issue to be considered as part of our every reason.

We hold our relationships with our clients to be the most important perspective from which to view our work; therefore, we value client feedback and consider client needs, safety and well-being in every decision we make.

We are continually mindful of the need to maintain the highest level of appropriate confidentiality in dealings with our clients as well as our co-workers.

We recognize and honor the fact that volunteers are an integral part of STAND! We prioritize their training and support, we trust and respect them enough to have high expectations of them, and we gratefully rely on their contributions to be the success of our mission.

We rely upon the expectation that those who choose to work with us will also hold a deep commitment to our work.

Our staff, volunteers, and services are, by conscious design, reflective of our commitment to serve and involve all elements of our community.

We are committed to the prudent management of our resources.

We believe it to be essential that in all our deliberations we maintain a willingness to examine issues holistically and in their complexity.

Experience has taught us that interdependence and collaboration among ourselves as well as with people and organizations within the community have been and will continue to be essential in our success.

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## **Interface Children Families Services**

### **Letter from the President & CEO as excerpted from their Human Resources Policies Manual**

Welcome to our hard-working team. Interface is proud to have your energy, dedication, skills and hard work added to our team of enthusiastic staff and volunteers as we go forward each day to meet the needs of our community and keep the promises we have made. We strive to develop a sense of community that values unity without uniformity and diversity without divisiveness. You can expect to have the opportunity to give your best and receive our best in return.

Interface is client and community-focused, values-based and outcomes-driven. The work we do is no easy task. The problems we face on behalf of our clients are no simple matter and the issues we confront on behalf of our community have no quick fix. We rely upon you and your team members to face difficult situations that cover such problems as domestic violence, juvenile delinquency, mental illness, child abuse and family dysfunction. We rely upon you to be mentally and physically prepared for helping people in their darkest hour and exhibiting some of their worst behavior. This is the work we do. This is the work that is needed. And together, this is how we make a difference.

On different occasions, I have been asked to comment on our phenomenal success. My best answer has been the incredible people who work and volunteer at Interface. Together we have developed and sustained a culture that breeds success. Our culture is about expectations and encouragement for innovation, creativity, positive client outcomes and keeping our promises to the clients and to the community. It is about teamwork, individual excellence and accountability. It is about the integrity of our core values:

- Respect and dignity of each and every one of our clients;
- Team work and collaboration internally and within the greater community;
- Commitment to excellence and continuous improvement;
- Accountability and responsibility for both action and inaction;
- Pride in what we do and who we are; and
- Doing what is needed rather than what is easy.

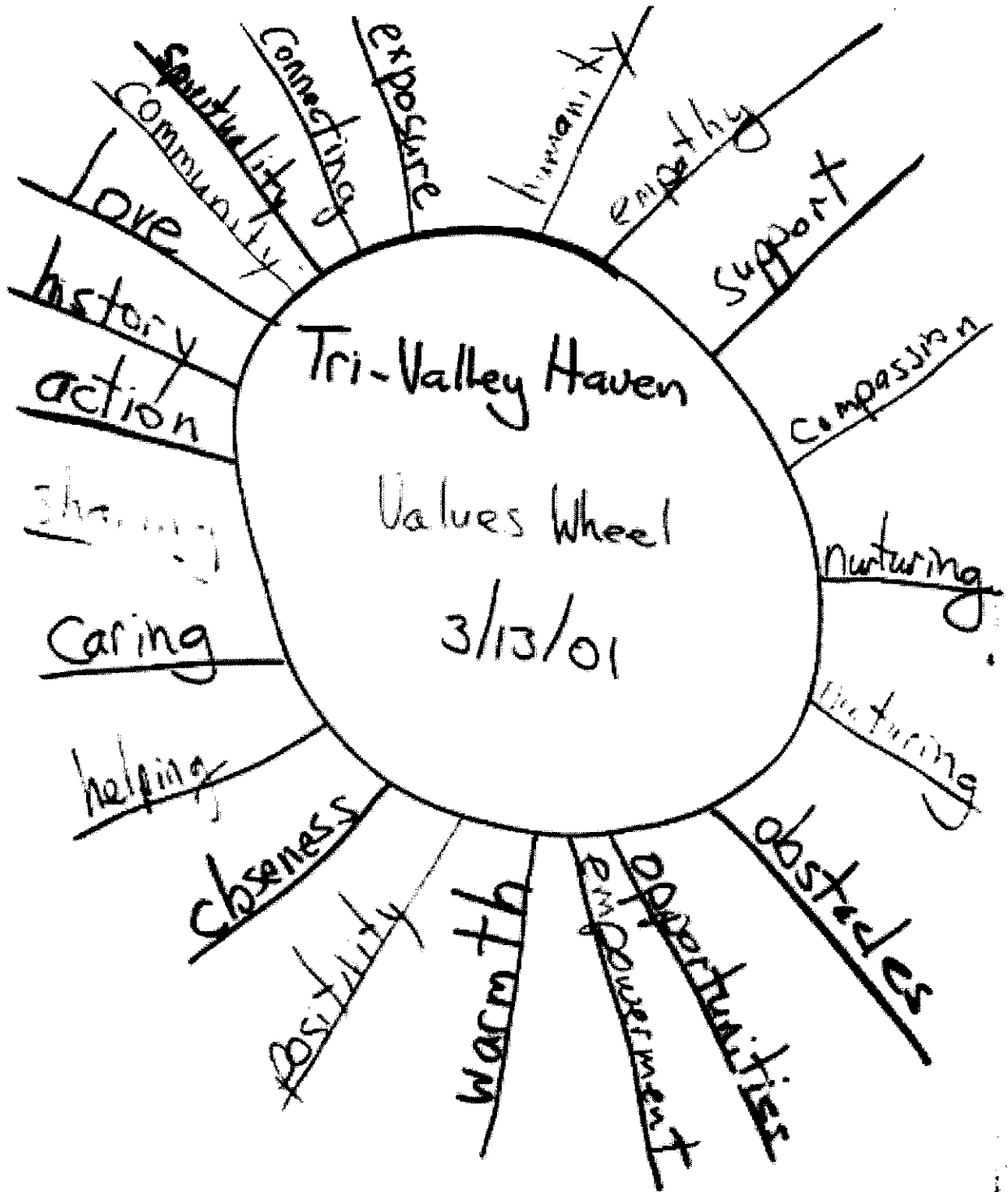
Today we have approximately 160 employees, 1200 volunteers and a couple of hundred contract therapists connected through our provider network. We touch the lives of over 195,000 people each year.

Sincerely,

Charles T. Watson  
President and CEO

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Tri-Valley Haven  
Values Wheel



Source: The Oertel Group and Interface Children Family Services, 2002

## Process for Developing Organizational Values

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**Step One:** The handouts titled “What Influences Organizational Culture” and “Applying Cultural Concepts to Organizations” should be copied and distributed to each staff member. These handouts provide a basic understanding of organizational culture and values.

**Step Two:** Each staff member should then complete the “Our Values” worksheet. This will probably take 10-15 minutes.

**Step Three:** Pair staff members and have them reach consensus on their top four values (approximately 10-15 minutes). Encourage staff members to work with someone with whom they do not usually interact. Indicate to the participants that part of the discussion will be understanding how people are using particular words (e.g. dedication, hard work, commitment – do these words mean different things to the staff members or just the words that the staff are most familiar with).

**Step Four:** Move to groups of four and have the groups reach consensus on their top *five* values (one more than allowed with previous steps). (Allow 10-15 minutes)

**Step Five:** Then have each group select a representative to meet with the representatives of the other groups. These representatives will reach consensus on the values ideally – no more than 6 or 7. During this discussion, the other team members from each group can stand behind their representative and counsel, if necessary. (Allow 15-20 minutes)

**Step Six:** Divide the staff into teams of 3-5. Have the teams initially take one to two of the values and complete the worksheet “Values Exploration and Alignment Worksheet.” This worksheet will have them begin to articulate why the value is important to them and how it effects their work. Convey to them that the management team will then take these worksheets to develop them into a value statement. The teams should then share the results of their work. (Allow 30 minutes).

**Step Seven:** The management team should then take the input from the teams and refine the statements. An example of values statements is included.

**Step Eight:** After the management team has updated the list, these should be circulated to staff and posted.

**Step Nine:** The management team should review the handout “Managing by Values Game Plan” to determine if any additional adjustments should be made to fully incorporate the values into the organization. For example, under a value such as “safety” possible changes might include having panic buttons at outreach office and having an office door through which people need to be buzzed in.

*Developed by The Oertel Group based on materials from Managing by Values by K. Blanchard and M. O'Connor.*

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### **Sample Value Statements**

- We value *safety*, both physical and emotional, because it is our organization's reason for being. The safety of clients and ourselves is the primary factor to be considered as part of every decision and action.
  - We value *honesty and integrity*, therefore we are willing to examine issues truthfully and in their complexity. Because of this work, we earn the respect of everyone essential to our organization.
  - We value the *commitment and dedication* of our staff, volunteers, clients and collaborative partners because everyone's hard work is essential to the fulfillment of the mission of our organization.
  - We value *working together* because our experience has taught us that interdependence and collaboration among ourselves and within the greater community are essential to our success.
  - We *respect* our clients, staff and volunteers and therefore provide them with the tools and knowledge that empowers them to make decisions regarding their lives and their work.
  - We are *open* to change and new information and therefore, we are responsive to community and organizational needs and appropriate approaches to address those needs.
  - We strive to develop a sense of community that values *unity* without uniformity and *diversity* without divisiveness.
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## Our Values

What should our organization stand for? What should be the values by which we operate. Look over the list of values below. Circle any values that “jump out” because of their important to you. Then write your top four values, in order of importance (#1 being most important). Feel free to add values if needed.

truth	persistence	resources
efficiency	sincerity	dependability
initiative	fun	trust
power	relationships	excellence
control	wisdom	teamwork
courage	flexibility	service
competition	perspective	cost-effectiveness
excitement	commitment	freedom
creativity	recognition	friendship
happiness	learning	influence
honor	honesty	justice
innovation	originality	quality
obedience	candor	hard work
community support	prosperity	responsiveness
integrity	respect	fulfillment
peace	fairness	purposefulness
loyalty	order	strength
clarity	spirituality	self-control
security	adventure	cleverness
love	cooperation	success
support	humor	stewardship
diversity	collaboration	inclusiveness
accountability	safety	warmth
empathy	compassion	empowerment

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Adapted from *Managing by Values* by K. Blanchard and M. O'Connor.

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## Values Exploration and Alignment Worksheet

### Further Value Elaboration –

We Value \_\_\_\_\_, Therefore \_\_\_\_\_

(e.g. We value *safety*, both physical and emotional, because it is our organization's reason for being. The safety of clients and ourselves is the primary factor to be considered as part of every decision and action.)

### *Current Value Existence Gauge*

< \_\_\_\_\_ >  
Non-Existent Fully Existent

### *Strategies for Closing Gap*

What would our organization be like if that value were fully present? (e.g. Organization has safety procedures and technology through which all staff/clients feel safe, organization has procedures for training and conflict resolution to ensure that all communication occurs in a respectful mode.)

## Managing by Values Game Plan

### *Phase 1: Clarifying Mission and Values*

- Board of Directors
- Management
- Staff
- Volunteers
- Clients
- Other Key Stakeholders

### *Phase 2: Communicating*

- Organization and Program Events (e.g. meetings, celebrations)
- Communication Materials (e.g. posters, brochures)
- Formal Communication Mechanisms (e.g. newsletters)
- Information Communication Practices (e.g. phone-mail message, e-mail)

### *Phase 3: Aligning Our Values with Our Daily Practices*

#### Individual Practices

- Self-Management & Development
- Problem Solving and Decision-Making
- Leadership Practices

#### Team Practices

- Effective Member Practices
- Group Dynamics and Processes
- Stages of Building High Performing Teams
- Team/Group Facilitation

#### Organizational Practices

- Strategic Management and Development
- Organizational Systems and processes
- Resources-Barriers Management
- Rewards & Recognition Practices

#### Continuous Improvement

- Review
- Re-evaluation
- Ongoing Action

*Source: The Oertel Group, 2002. Adapted from materials from Managing by Values by K. Blanchard and M. O'Connor.*

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### **Resources**

Strategic Planning for Nonprofit Organizations, A Practical Guide and Workbook by Michael Allison and Judy Kaye, ©1997, ISBN: 0-471-17832-2, John Wiley & Sons, Inc., \$39.95 +shipping, New York, NY, 277 pages, Order from John Wiley & Sons, Inc.

This workbook is aimed at board and staff leaders of nonprofit organizations to do effective strategic planning. It includes articulating mission and vision, agreeing on priorities, writing goals and objectives and monitoring and evaluating your strategic plan. A disk is included.

Strategic Planning Workbook for Nonprofit Organizations, revised and updated, by Bryan W. Barry, © 1997, ISBN: 0-940069-07-5, Amherst H. Wilder Foundation, St. Paul, MN, 130 pages, Order from Amherst H. Wilder Foundation

This workbook includes step-by-step guidance through planning phases, how to create a shared vision and more. It also includes a detailed sample of one nonprofit's actual three-year plan.

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