

## What it is

A process for creating and implementing a set of shared Values in an organization<sup>1</sup>

## What it can do

This tool can assist you to:

- Identify and articulate shared Values for a team or organization
- Align members of a team or organization around owning the Values
- Help implement and integrate Values to help shape and inform collective awareness, behavior, and decision making

## When to use it

- To clarify, update, and/or realign around existing team or organizational Values.
- To articulate and create a set of Values for a new or evolving organization, team, coalition, etc.

## How it works

This tool is available online at: [atctools.org/resources/tools-for-transformation](http://atctools.org/resources/tools-for-transformation)

Examine the development and use of effective Values in three phases as follows:

**Phase 1** Define a set of *shared* Values for your team or organization: REQUIRES 45 minutes to two (2) hours depending on whether values already exist

**Phase 2** Make Values meaningful and relevant in the context of working together (whether new or already in place): REQUIRES one (1) hour

**Phase 3** Implement new (or renewed) Values in a way that builds alignment and commitment: REQUIRES approximately three (3) hours

*NOTE: This work can be stretched out over the course of days or longer – with Phase 3 coming after the team or organization has spent some time working with Phase 2.*

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<sup>1</sup> Thanks to Leslie Sholl Jaffe for her work in helping create this tool.

## PHASE 1: Define a set of shared Values for your team or organization

### Set the context:

#### SAY:

- Greatness – in organizations as in individuals – is a measure not only of what is accomplished, but how it is accomplished.
- At the root of all human planning, choice, and behavior is a guiding set of priorities — of Values. Most often, these Values are unspoken, even unconscious. But when they are made explicit, they are given new force, energy, and legitimacy.
- When chosen with deep awareness and authenticity, they provide a platform for powerful impact and influence in the world – a platform for greatness.
- Core Values are demonstrated in every aspect of how we think, act, and relate as members of our organizations. They reflect:
  - Our most basic precepts about what's important in our organizational, professional and personal lives – what is to be held sacred and inviolate
  - Those enduring principles that are the core of the organization's greatness
  - The standards against which acceptable and non-acceptable behavior is determined

### A) Examples of Values and Their Impact: 10 min.

**ASK** people to give examples of what they believe Values are and to describe their impact. *Some examples:*

- Guiding principles – help guide behavior
- Standards – establishes clear expectations
- Beliefs – helps create a shared context

**ASK:** Why would any team, any organization – any group of people working together – choose to declare a set of Values? What might be the desired impact? *Some examples:*

- Attracts certain kinds of people
- Defines how we want to treat each other and the outside world
- Creates consistency regarding expectations for behaviors and attitudes
- During change can create consistency and stability
- It seems like the right thing to do

#### SAY:

- When you declare your Values, you are putting yourself out there: visible, vulnerable, accountable.
- It tells the world that just producing results is not acceptable; how you produce those results is also fair game to be looked at, talked about, and measured.

- When defining Values, it's important to keep in mind that we must be committed to consistently following through on them.
- This means integrating the Values into more than our personal behaviors; they must be reflected in everyday measures, performance systems, how we choose who we hire or partner with, how we orient new team members, where we place our emphasis on recognition and development, etc.
- We are inspired to give our best when our own personal Values align closely with the Values of the teams and organizations we choose to be a part of.
- Fundamentally, defining and committing to shared Values is not just about doing the right thing; it is an investment in producing higher quality and more sustainable results. Values should not only reflect what feels good—they also should reflect what we believe is absolutely required for success of the organizational mission.
- Through change, *Values remain the same.*

**Option 1:** If the team/organization **already has** an established set of Core/Shared Values, transition and **jump ahead to Phase 2.**

**Option 2:** If the team/organization **does NOT have** an established set of Core/Shared Values, **continue with Phase 1, as below.**

## B) Thinking About Values: 15 min.

### SAY:

- We're not making up something new here. Our values already do exist. This is a process of noticing, discerning, and affirming the implicit expectations we all share as a team.
- As we talked about earlier, simply by making them more explicit, we give them more power and influence. We become more conscious, more aware. We begin to hold ourselves and others more accountable. And we create a shared framework within which we all know how to build these Values into every experience, every process, and every outcome created by this team.

### Handout: "Thinking About Values"

- Put yourself "in the shoes" of the (team/organization/community) represented by each of us here in this room.
- Spend some time answering the questions on this handout not from your own, individual perspective, but from your sense of the shared aspirations and intentions of this (team/ organization/community). As a whole. As an entity all its own.

(The questions):

- What is most important?
- What is not okay to violate or compromise?
- What are our core principles?

- o Imagine times of crisis, critical decisions, emotional challenges. . . What stood out as most important?
- o If you had to capture these principles in five (5) distinct “headline” categories, what five words would you use?

Allow 10 minutes; periodically prompt/remind people to think in terms of the *group as a whole*.

### C) From Many, One – Facilitated Group Report Out: 60 min.

#### Step 1 Facilitate a discussion of people’s lists, comments, insights.

- Encourage people not to get caught-up with wordsmithing, but to think in terms of thematic similarities or distinctions.
- During the process, begin to chart different “themes” on separate flip charts – generally, you will have no more than 8-10 distinct themes (e.g., “Honesty,” “Integrity,” “Straight-forwardness,” “Candor,” and “Truthfulness” could all appear on the same page)
- If in doubt, keep the values separate – you will have the opportunity to let the group consolidate the lists next.

#### Step 2 Facilitate consolidation:

- You want the group to self-select the 4-to-6 shared Values that are most inclusive and representative of the shared Values identified. There are several options you can use, among them:
  - o **Sticky Notes:** Have individuals write the five (and only five) core Values from their worksheet on five separate sticky notes, and then place the notes on whichever “theme” flip chart page best represents that value for them. Work interactively with the large group to consolidate themes down to 5-6 charts, and discuss whatever may have to “fall off” the final list during the process.
  - o **Small Groups:** Break the room into groups of 4-5 and have them process the content generated by the large-group dialogue (and captured on the flip charts) down to their own list of five “headline” Values (without getting caught-up in wordsmithing). Bring the groups all back together to present, and interactively facilitate a final consolidation of the lists.
  - o **Triads:** (There are three roles: A, B, C)
    - A: Speaks to the **THREE (3)** shared Values that now seem most significant to them, and why
    - B: Actively listens
    - C: Observes and takes notes on content and process
    - 2min. conversation, followed by 1-min. feedback on process only then switch roles
    - Once the triads complete their conversations, have them come to agreement on the “Top 5” shared Values

- (Depending on size of group) Combine triads (2-4 triads per small group), and have the triads present to each other their findings; the small groups must come to agreement on their own list of Top 5
- Have small groups present to the room; facilitate a final reconciliation and consolidation of the Top 5
- Regardless of process used, remind people not to get hung up on specific words – meaning and intention (which they will work on next) are more significant than the labels themselves.
- Challenge the group to actually make choices. In the attempt to come to agreement, there is often a tendency to avoid decisions by clumping Values together – sometimes to the point where clarity and meaning are lost.
- If desired, at the end of the session, the group can assign a small team to take the final “wordsmithing” of session outputs offline to polish the presentation and present back to the group for final approval.

## PHASE 2 Make Values meaningful and relevant in the context of working together

### Set the context:

- Beyond identifying those core Values that authentically resonate for the entire team/organization, it is also important to create a shared definition and meaning for each of them. Each value on any list exists as a word – a word subject to various interpretations and even disagreement.
- The Value words begin as an intellectual construct: not really tangible, and meaning nothing other than whatever meaning we choose to give them.
- For Values to be effective across our team and over time, we need to be more specific in articulating what they mean and how they are demonstrated.
- Example: For the value “Respect,” a counter-culture child of the 60s whose family value was “Respect” might have one picture of what “Respect” means. Someone else who grew up in a family with traditional Christian values or with military upbringing might also have “Respect” as a family value, but a very different understanding of what that value means. Now imagine these people are working together for a team for which “Respect” is a stated value. Team members have to really work to develop aligned understanding of what their organizational values actually mean.
- If Values are to inform any team or organization, shared meaning and alignment are *critical*.

**Process:****A) Developing Meaning: Living/Not Living the Values: 45-60 min.****SAY:**

- What we want to do now is create some shared meaning around each of these Values.
- For each, we want a small group to spend some time offering distinctions between what living that specific Value looks like in the context of our organization ... and what not living it looks like.

**Step 1 Facilitate small group activity**

- Place (4-6) flip chart sheets around the room, with one identified Value on each page.
- Direct participants' attention to the three-page handout: "Making the Values Real (Example & Worksheet)"
- Have people self-select: "Choose the one Value you would most like to work on." Try to make sure all Values are covered by at least one team.
- To whatever degree is necessary, facilitate an appropriate balancing of the teams.
- Have each group select a recorder and a timer.
- Instruct the teams to work on providing specific, work-related examples of what "not living the Value" looks like in the current shared culture.
- Encourage people to:
  - Draw on personal experience as much as possible, or upon incidents about which they have personal knowledge.
  - Try to make their descriptions as grounded in relevance and reality as possible.
- Have each team record at least four solid examples of "not living the Value."
- After 10 minutes, have them shift their attention to what "living the Value" either looks like (drawing on actual observations or experience) or can look like (envisioning a new cultural norm/habit).
- Again, encourage people to:
  - Draw on personal experience as much as possible ... or upon incidents about which they have personal knowledge.
  - Try to make their descriptions as grounded in relevance and reality as possible.
- Have each team record at least four solid examples of "living the Value."
- After 10 minutes, reconvene as a large group for report-outs.

**Step 2 Facilitate Small Group Report-Outs and Dialogue**

- Have each team present (in turn):
  - The Value
  - What “not living the Value” looks like in our culture
  - What “living the Value” either looks like or **can** look like in our culture
- For each value, encourage a brief interactive dialogue, in which all participants have the opportunity to contribute personal insights into the culturally relevant distinctions that contribute to a more comprehensive and/or definitive characterization of that Value in the context of working together.
- **OPTIONAL:** Provide each participant with enough “Making the Values Real” handouts for them to capture shared distinctions that are relevant and to continue building the list of distinctions on their own.
- Close by allowing participants 5 min. to jot down personal notes and reflections concerning their awarenesses and “take-aways” from the process, the dialogue, and the outcomes.

**SAY:**

- Individually and as a team, we all play a role in shifting from a culture in which “not living the Values” is familiar and commonplace to one in which “living the Values” is the standard by which everyone measures themselves and each other.

**PHASE 3: Implementing new (or renewed) Values in a way that builds alignment and commitment****Set the context:**

- Values take on life and gain real traction in any culture only when each individual feels a personal stake in their success. While people’s “attitudes” about the Values may not be easily deciphered, their **behaviors** can easily be assessed against the meaning and intention of those Values.
- One of the key disciplines for embedding Values in any culture involves actively **noticing** the “Values content” of people’s words and actions – and being willing to provide clear **feedback** on what you notice that supports the intent of our shared Values, as well as those that seem contrary to the spirit of those Values.
- Only when team members, regardless of level or position in the organization, hold themselves and each other accountable for at least **striving** to demonstrate the shared Values in a conscious and consistent manner will those Values begin to infuse the culture. Only then will they begin to shape and inform the quality of interactions among team members and (perhaps more importantly) the quality of others’ experience of our team/organization/community.

**Process:****A) Personal Values Alignment: 15 min.****Step 1 Review/Overview of Core Values**

- Implications of aligning to and living the organization's Values

**Step 2 Direct participants to reflect individually and then discuss their reflections with a partner.**

- How do your personal Values line up with these "shared" Values?
- Maybe some are the exact same words, maybe some are not but are they close enough for you to see how this is a place for you to work in integrity with yourself?

**Step 3 Ask for a few volunteers from the large group to share:**

- How their Values sync up
- What take-aways they have

**B) Assessing the Current State (Handout): 10 min****SAY:**

- Values are aspirational... none of us can actually live each and every value 100% of the time.
- We may even find that we are more inclined toward some Values over others – or that some come more naturally or easily for us than others. It's not about "good" or "bad"... just what is.
- The key is: to really notice current reality so that we have a solid basis from which to improve over time.
- Take a moment to complete the "Current State" assessment handout:
  - On a scale of 1 (*not living the value very much*) to 10 (*living the value fully*), rate your experience of the degree to which this value is found in this (team's/organization's/community's) current culture.
  - Notice which you have rated the highest and which you have rated the lowest.
  - Consider: What can you do personally to help shift the lower rated Values to a higher level of demonstration?
  - What obstacles will you need to overcome?
  - What commitments are you willing to make – to yourself? To others?



### C) Creating Shared Awareness/Agreement Around Living the Values: 40 min.

#### PREP:

- Have the identified Values written on flip chart pages around the room, one to each flip chart page. Make a T-chart with the name of the value across the top, and 'less of' on the left side of the T and 'more of' on the right side of the T.
- Have the group count off by the number of Values (should be 4-6) and have the groups go to the Value chart with their corresponding number on it.
- **NOTE:** For this process, make it clear that each group is assigned to focus only on the Value written on their own flip chart.

#### Step 1 Facilitate Small Group Work

#### SAY:

- **Each group needs a recorder and timekeeper.**
  - Your task over the next fifteen minutes is to brainstorm the specific Values-based behaviors (actions people can take) that you would like to see more of if we are to truly live this value. Be as specific as you can be.
  - *Take an example or two and work the example to make them as specific as possible.*
    - *Poor example:* "Better communication"
    - *Better example:* "Timely and honest feedback on performance goals"
  - Your task is to also brainstorm the specific behaviors that you would like to see less of if we are to truly live this value. Again, be as specific as you can be.
  - *Take a couple examples from the group and help to make them specific.*
    - *Poor example:* "Disrespect"
    - *Better example:* "Stop the hallway gossip behind people's backs"
  - **Demonstrate: (Using model flip chart):**
    - *You will capture the "More Ofs" on the right side of the chart (WRITE "More Of" on top right)*
    - *Capture the "Less Ofs" on the left side of the chart (WRITE "Less Of" on top left).*

- *Interrupt the discussions after 10 minutes:*

**SAY:**

- What I'd like you to do next is narrow your list to Top 3 "More Ofs" and "Less Ofs" that would make the biggest difference. Be prepared to report out after your group's Top 3 from each column in 10 minutes.
- *Allow 10 more minutes.*

**Step 2 Facilitate Small Group Report-Outs and Dialogue: 10-15 min.**

- Encourage people to be clear and succinct: SAY: "Just read the Top 3 from your chart. There is no need to elaborate."
- *Optional:* Facilitate a brief large-group dialogue about the findings as well as any ideas and insights they may trigger for participants.

**SAY:**

- What difference would it make in our organization if each of us committed to doing "More Of" or "Less Of" the behaviors that are on these lists? (*Take responses from the group.*)
- What is the personal benefit to you of living these Values on a day-to-day basis?
- Write down your thoughts as to what you personally can do to enhance your contribution and impact through more Values-driven behavior.

**D) Linking Values to Results: 60 min.****Step 1: Introduce Activity**

- As we have seen, in order for Values to be real, we have to take Values out of being mere statements and develop them into descriptions of behavior.
- We also need to learn how to hold each other accountable to them by creating clear expectations and aligning them to hiring practices, performance reviews, skills training, and other organizational systems.
- People need to see that Values are more than just the right thing to do or just a nice thing to do – Values drive our behavior and our behavior drives our actions, which create our results.
- Organizations declare themselves to be Values-driven because it makes good sense.
- In order for Values to be strategic they must link to the organizational results we are responsible for achieving and the work we do every day.

- What we want to establish is a “clear line of sight” for every employee, between each Value and the measures we are responsible for meeting every day.
- Organizations that are Values-driven set a high level of expectation around attracting high quality performers with Values-based behavior.
- Values are a constant and can insure increased productivity and quality during times of change.

**Step 2: *Walk through a Sample Activity Output***

- Walk through an example with the group, using a demo flip chart that has one of the agreed upon behavioral descriptors (see sample demo chart following the activity instructions).
  - The value is “Teamwork” and behavior is “Think and act beyond organizational boundaries.”
  - An action supporting that behavior might be collaborating with other organizations in the sector to better meet the overall needs of our constituency.
  - How might we measure this? We could look at how many more members are getting served.
  - How do we measure this against our performance measures? We could look at increased member satisfaction.
- Take another example from the group and process it with them, helping to clarify the exercise they will be doing. Be sure that each behavior is specific.

**ASK:**

- Is there anyone who is unclear about how we made these connections? It is important to ask now, because we are going to move into small groups so that each of you has an opportunity to see how this links directly to the work you are doing.

**SAY:**

- For most of us this will be the first time we attempt to link Values to our organizational metrics, so chances are you may find this challenging. If you struggle, raise your hand and ask for help. Consider this practice for a new way of looking at results. The real impact is when you take this practice and apply it back on the job.

**Step 3 Direct people to link Values to Behaviors**

- Ask participants to go back to the same Value they were working on before.
- Depending on the size of the groups, split them into smaller groups and have them work more than one of the behaviors.

**SAY:**

- Each group needs a recorder and timekeeper.
- For your behavior, as a group, come up with one example. Put this example on a flip chart using the format on the demo chart. Be prepared to share your example with the big group if selected.
- The key is to be as specific as you can be.
- Take fifteen minutes to develop one example.

**Step 4 Facilitate Report-Outs**

- Who thinks they have a compelling example?
- The criteria for “compelling” are: the example clearly demonstrates how the behavior impacts one of our organizational metrics AND it can be simply explained to anyone in the organization.
- We’re going to take one example per Value so we get an idea of how Values drive results.
- Who would like to go first?

**E) Holding Ourselves /One Another Accountable for the Values (Handout):  
15 min.****Step 1: Explain Accountability:****SAY:**

- The “real world” is one of complexity, change, and action. In the midst of this reality, we are challenged to make choices and decisions based on what we believe will reflect our Values in action. This is seldom quite as easy as we’d like.
- The fact remains, however, that Values will make a difference in our (team/organization/community) only when they begin to make a difference in ourselves.

- How do we hold each other accountable to the Values?
- Both producing the results and HOW we produce the results have to have equal weight AND the playing field must be level – positional power does not get to take a pass.
- There is a simple grid that helps organizational leaders to understand and communicate a rationale for personnel decisions designed to promote the strategic alignment of business results with Values-driven behavior (see handouts that follow instructions).
- It holds insights that are of value to anyone who is interested in seeing Values successfully embedded and sustained in any culture.
- *Optional:* Have the “Performance/Values Grid” illustrated on a flip chart or simply refer to handouts.

**Step 2: Explain Key Elements of Performance/Values Grid**

- Those who neither produce results nor live the Values are clearly out of alignment with the organization and should be transitioned out.
- Those whose behavior supports only one axis of organizational performance (and not the other) should be coached to improve in the weaker dimension; over time, if coaching fails, removal must be a consequence.
- Long term, it is critical that even those who continue to produce results while failing to live the Values be held fully accountable for development; if coaching fails, follow-through on the consequence is essential.
- The cultural “shift” of transformation becomes a reality when leaders demonstrate their willingness to make the hard choices required to remove high-results/low-Values performers.
- In this matrix, there are some easy calls to make:
  - “Get results and live the Values” = “Stars”  
(These people are rewarded very well.)
  - “No results and no Values” = “Gone”
- What about individuals living the Values, but not getting the results?  
Options:
  - Coaching/training: help this person to get better results
  - Reposition: try to find another role in the organization better suited to their talents.

- Depending on factors like their motivation, length of time at the organization, and assessment of their potential for improvement, we can choose varying lengths of time to test for progress in the person's ability to generate results.
- What about the individuals who get incredible results, but are a walking violation of the Values? "Gone!" Not the next day, but after being given opportunity, coaching, and training, there comes a point when they have to be let go. Failure to do so undermines the integrity of the organizational values.
- The process is not tidy, it needs a lot of dialogue, communication, shared understanding, learning how to hold people accountable; however, it has great payoffs in better results, more productive people, better alliances, etc.
- We know you can count on a lot of change, and in organizational change processes one of the few things you need to be able to count on is your Values not changing.

**Step 3: *Debrief and Close: 10 min.***

- What are the challenges of implementing Values in the workplace?
- What are the benefits?
- What needs to shift in our hearts and minds/ behaviors/ systems to fully implement our Values?
- Reflect back on the session, summarize, communicate next steps, and close as appropriate.

## Thinking About Values

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Put yourself “in the shoes” of the community...

- What is *most* important?
  
- What is *not* okay to violate or compromise?
  
- What *are* our core principles?
  
- *Imagine times of crisis, critical decisions, emotional challenge... What stood out as most important?*
  
- If you had to capture these principles in *five (5)* distinct “headline” categories, what five words would you use?

*Through change, Values remain the same.*

## Assessing the Current State

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On a scale of 1 (*not living the value very much*) to 10 (*living the value fully*) rate your experience of the degree to which this value is found in this (team's/organization's/ community's) current culture.

- **Shared value:** \_\_\_\_\_ **Rating:** \_\_\_\_\_

*If applicable, notes on why not rated a "1" ... and not rated a "10"*

- **Shared value:** \_\_\_\_\_ **Rating:** \_\_\_\_\_

*If applicable, notes on why not rated a "1" ... and not rated a "10"*

- **Shared value:** \_\_\_\_\_ **Rating:** \_\_\_\_\_

*If applicable, notes on why not rated a "1" ... and not rated a "10"*

- **Shared value:** \_\_\_\_\_ **Rating:** \_\_\_\_\_

*If applicable, notes on why not rated a "1" ... and not rated a "10"*

- **Shared value:** \_\_\_\_\_ **Rating:** \_\_\_\_\_

*If applicable, notes on why not rated a "1" ... and not rated a "10"*

- **Shared value:** \_\_\_\_\_ **Rating:** \_\_\_\_\_

*If applicable, notes on why not rated a "1" ... and not rated a "10"*



## Making the Values Real: Example

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**ORGANIZATION X's core Values reflect how we work inside and outside the organization to achieve our mission, vision, and goals. Our shared Values are:**

**Creativity:** We think beyond current constraints and traditional ideas, rules, and relationships. We seek to engage diverse perspectives, resources, and partners. We view issues and situations in fresh ways, create meaningful approaches, and learn from both failure and success.

**Compassion:** We understand the interconnectedness of humanity and strive to alleviate suffering specifically with our core constituency of low-income people and people of color. This awareness is the taproot of our creativity and courageousness. To do this, we recognize that compassion starts with having compassion for ourselves. We work with each other, with colleague organizations and community members with respect and integrity, seeing and supporting one another as partners towards common purpose.

**Courage:** We willingly take risks to stand up for what we believe, even when it is unpopular. We communicate courageously with one another because we recognize that is how people, organizations, and movements grow stronger.

*On the following page you will find key behavioral descriptors for ORGANIZATION X'S Shared Values that were developed through participatory engagement of the entire staff in May and June 2011. These descriptors serve as a guide for the kind of behavior we wish to see or discourage in ourselves and in each other so that we can lead with our Values.*

<b>BEHAVIORAL DESCRIPTORS</b>	
What NOT living this value looks like	What LIVING this value looks like
<p><b>CREATIVITY</b></p> <ol style="list-style-type: none"> <li>1. Being afraid of experimentation and failure.</li> <li>2. Doing something new just because it's new and appears to give us visibility.</li> <li>3. Not seeking out different perspectives from each other or new people. Talking to each other in the same old ways and expecting different results.</li> <li>4. Shutting down with quick "No's" to any new ideas or brainstorming.</li> <li>5. Staying in the safe comfort zone of following the most favored/popular point of view and being afraid of what other people will think.</li> </ol> <p><b>COMPASSION</b></p> <ol style="list-style-type: none"> <li>1. Dismissing and interrupting.</li> <li>2. Not listening deeply to what someone is saying.</li> <li>3. Not factoring in people directly impacted by a decision and pushing a view that the results matter over people's capacity, development, or needs</li> <li>4. Being in a hurry and moving too fast such that you don't even notice or appreciate the people around you and their perspectives and gifts.</li> <li>5. Not being fully present and not paying attention.</li> </ol> <p><b>COURAGE</b></p> <ol style="list-style-type: none"> <li>1. Hanging back and watching things unfold until it's safe to express an idea or opinion that may be unpopular; waiting to see what the crowd will do.</li> <li>2. Avoiding making hard choices and thus spreading ourselves thin.</li> <li>3. Going along with what's easy even when it's not right.</li> <li>4. Not admitting your shortcomings, failing to ask for help or admit you were wrong.</li> <li>5. Stepping down from sharing your idea.</li> </ol>	<ol style="list-style-type: none"> <li>1. Let go of non-essential activity so we have the space and capacity to do any of the following.</li> <li>2. Consistently create safe spaces and time for honest and open conversation about what we're learning personally and about our work so that we can foster trust, risk taking, use differences/conflicts constructively, have fun, and generate new ideas.</li> <li>3. Embrace new ideas through shared credit and risk-taking.</li> <li>4. Name our assumptions and drop them so we can consistently be open and curious with questions of "What if..." and "Why?"</li> <li>5. Accept that failure is part of risk-taking.</li> </ol> <ol style="list-style-type: none"> <li>1. Consistently be aware of how interconnected we are and that our actions impact each other and the people we work with and for.</li> <li>2. Proactively offer time, knowledge, experience, and resources to help each other succeed – even if it's not in your area of responsibility.</li> <li>3. Lift up and appreciate the contributions of individuals and organizations regardless of their position or influence.</li> <li>4. Respect people and organizations with "where they are at" by genuinely connecting and not judging people's emotions and reactions.</li> <li>5. Acknowledge and prioritize the whole person in the work, from agenda design to budget in our programs.</li> </ol> <ol style="list-style-type: none"> <li>1. Communicate truthfully about how you really feel so that a relationship (with a boss, colleague, partner, funder) can transform.</li> <li>2. Take the first step out in front even in the face of change, difficulty, or uncertainty.</li> <li>3. Allow yourself to be vulnerable.</li> <li>4. Maximum commitment and minimum attachment – low ego – for the advancement of collective purpose.</li> <li>5. Make hard choices and stick with them.</li> </ol>

# Making the Values Real: Worksheet

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## Shared Value:

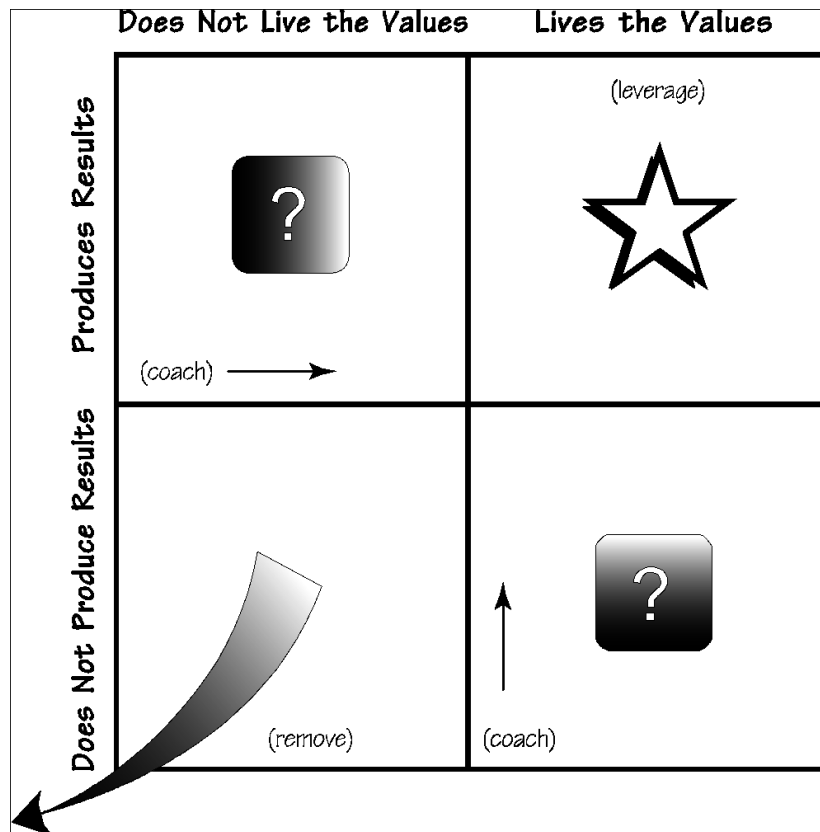
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*Relevant work-life examples of...*

<i>Not Living</i> this Value	<i>Living</i> this Value

# The Performance/Values Grid<sup>2</sup>

This simple grid helps organizational leaders to understand and (in turn) communicate a rationale for personnel decisions designed to promote the strategic alignment of business results with Values-driven behavior. Its basic principles are of interest and value to **anyone** who is interested in participating in a Values-based culture.



- Those who neither produce results nor live the Values are clearly out of alignment with the organization and should be transitioned out.
- Those whose behavior supports only one axis of organizational performance (and not the other) should be coached to improve in the weaker dimension; over time, if coaching fails, removal must be a consequence.
- Long term, it is critical that even those who continue to produce results while failing to live the Values be held fully accountable for development; if coaching fails, follow-through on the consequence is essential.
- The cultural “shift” of transformation becomes a reality when leaders demonstrate their willingness to make the hard choices required to remove high-results/low-Values performers.

<sup>2</sup> The Values/Performance grid was originally developed by Jack Welch, former CEO of General Electric.

**Sample Demo Value Chart:**

