



Learnings from the Field: A Collaborative Approach for Creating Organizational Values

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Think of a leader who inspires you. What might be 1-2 the values that they hold dear?

Welcome!



Judith Sugg



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**Alexandra
Rice**



**Katelyn
Entzeroth**

What are 2 of your personal values
around work/career?

Overview of Tonight

History of the Project and Models

Your Turn!

Design and Questions We Used

Your Turn!

Data Analysis and Putting it All Together

Implementation

Your Turn!

Closing Thoughts: Trauma-Informed, A Dance of Teams,
Q&A

A group of people in a meeting room, some standing and some sitting, engaged in a discussion. The image is faded and serves as a background for the text.

Overview of the Project

Concepts

Approaches and examples

Process

Framing the Concepts

Personal Values

Organizational Values

Aspirational vs. Actionable

Conflicts in Values

Who sets values?

Approaches to identifying values

9 whys?

Lencioni

Appreciative inquiry

Client's needs

MISSION/VISION

IDENTITY

BELIEFS & VALUES

CAPABILITY & SKILLS

BEHAVIOR/ACTION

ENVIRONMENT



We looked at examples of other non-profits

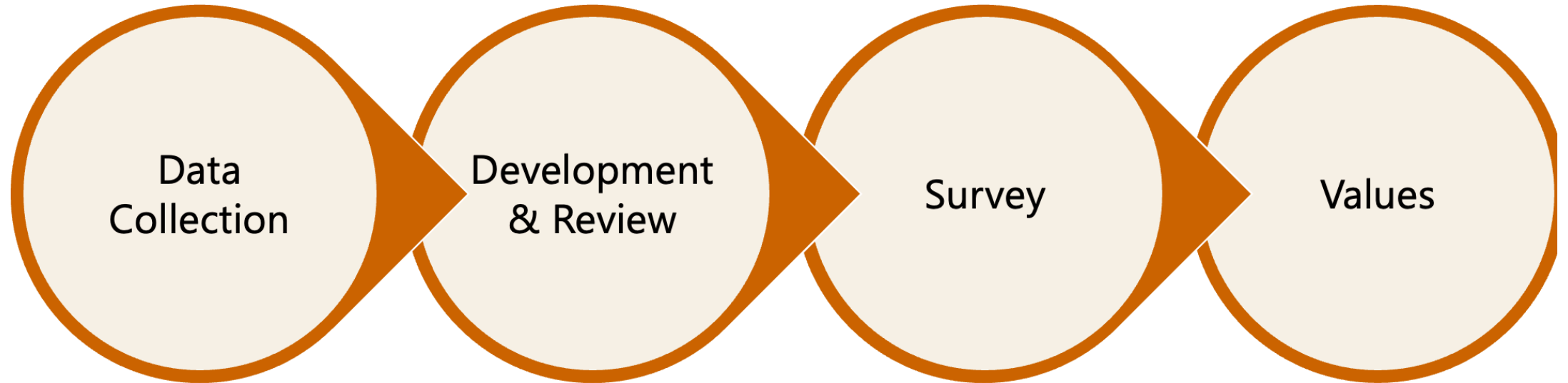
Food Bank: Compassion, Enjoyment, Collaboration, Integrity, Excellence

ARC: Human Dignity, Personhood, Choice, Rights, Community Support, Equity, Diversity

Community Change: Creativity, Compassion, Courage

YMCA: Respect, Responsibility, Caring, Honesty

Overall process



- Interviews
- Focus Groups

Internal
Stakeholders

All employees
Validation

Leadership
Implementation

1. Launch with 20+ key management
2. Appreciative inquiry approach to data collection
3. Analysis and survey design: Brief, available to all, building on interviews and focus groups
4. Layers of review and communication

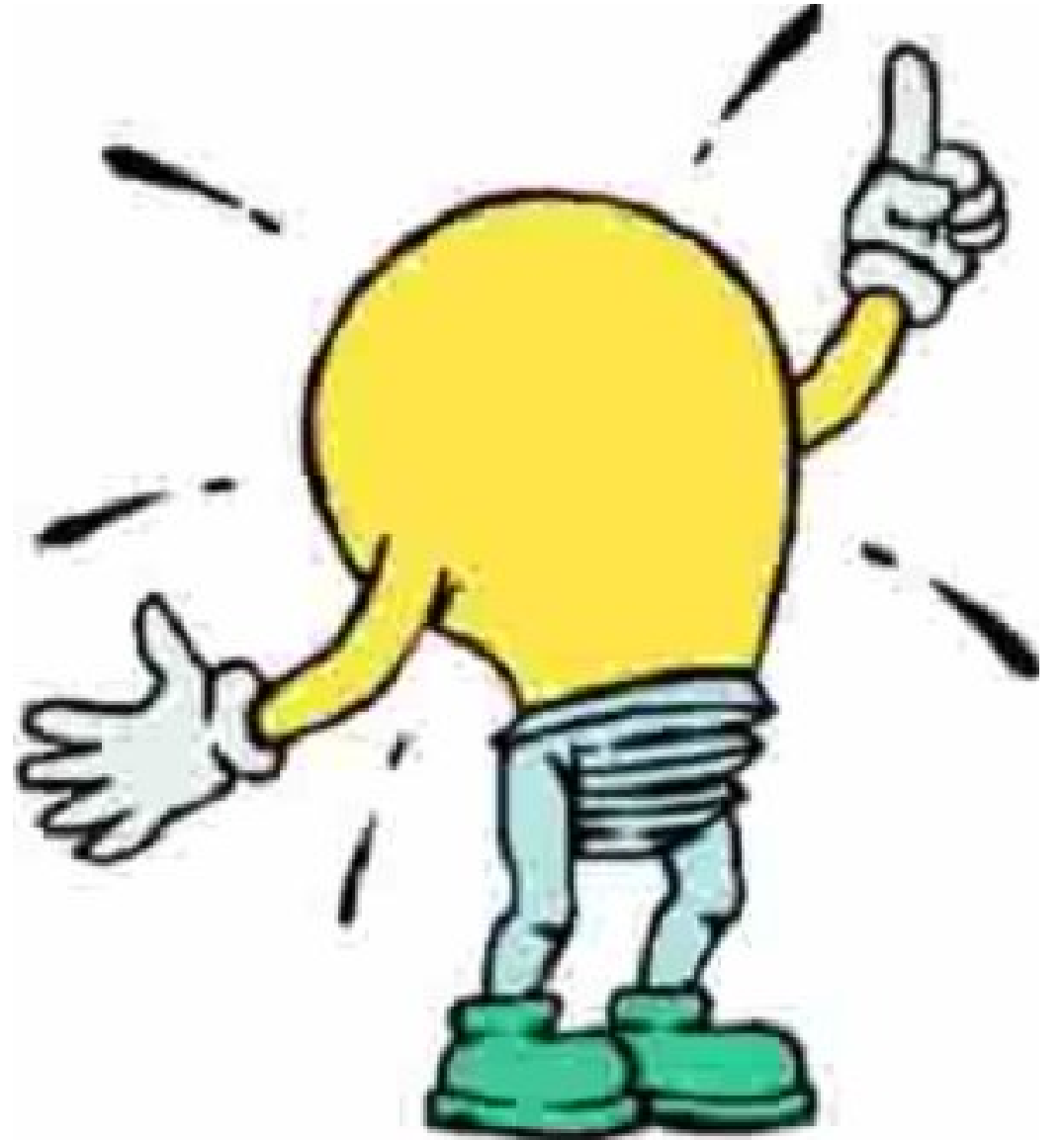
Individual interviews (24)

Focus groups (8)

Survey (Entire organization; 541 responses)

Group Brainstorm:

How else could you get at organizational values?



Appreciative Inquiry Questioning

Interview your partner using Questions 1, 2, and 3. (10 minutes total)

- Describe a high-point experience at work -- a time when you felt most engaged and inspired? Why was this important?
- Without being modest, what is it you value most about yourself, your work and your organization?
- What are the core values that are energizing when the organization is at its best?

[Chat has an edited version of (1) interview, (2) focus group, and (3) survey questions.]

~~Crunching the NUMBERS~~ Understanding the Squishy Words From Interviews and Focus Groups

PROCESS



Seeing the Forest and the Trees

Initial Categorization Image

Category 1 Ability to pivot Adaptability Agile Disruptive Excellent leadership Flexibility	Emerging Technology Identifying what's possible with what's optimal Needs Policy and advocacy Problem solving Guidance Culture	Succeeding through challenges Success through challenges Technology enabled Risk avert over
Category 2 Awareness, free sharing Information Clarity Cross communication Communication Crossed cross-sectional Cross agency engagement	Cross department Sensationality Cross departmental Integration Cross functional teams Cross team communication Co projects Street evaluation Diversity	Maintaining relationships as the norm to new approaches Making connections and relationships Open communication Emergency Frequent dialogues Trust
Category 3 Acceptance Actionable Being good at developing relationships Being genuine Being people people Building trust and maintaining	Connectivity Creative problem solving to keep providing care for our clients Diversity Dedication to mission Flexibility in executing strategies Drive to provide the best	Mission driven Cross-related Openness Guidance Encouraging people to resources a promotion Relationship with clients Funds drive Sense of accomplishment Sense of belonging

Working Group Workspace Image

The workspace image shows a wall covered in sticky notes, organized into three categories:

- Category 1 - Responsiveness**: Includes notes like 'Ability to pivot', 'Adaptability', 'Agile', 'Disruptive', 'Excellent leadership', and 'Flexibility'.
- Category 2 - collaboration, communication**: Includes notes like 'Cross departmental Sensationality', 'Cross departmental Integration', 'Cross functional teams', 'Cross team communication', 'Co projects', 'Street evaluation', and 'Diversity'.
- Category 3 - mission, engagement, community**: Includes notes like 'Connectivity', 'Creative problem solving to keep providing care for our clients', 'Diversity', 'Dedication to mission', 'Flexibility in executing strategies', and 'Drive to provide the best'.

Below the sticky notes, there is a section titled 'Idea Parking Lot (add sticky notes)' with a grid of sticky notes and a small photo of a parking lot.

From Mural

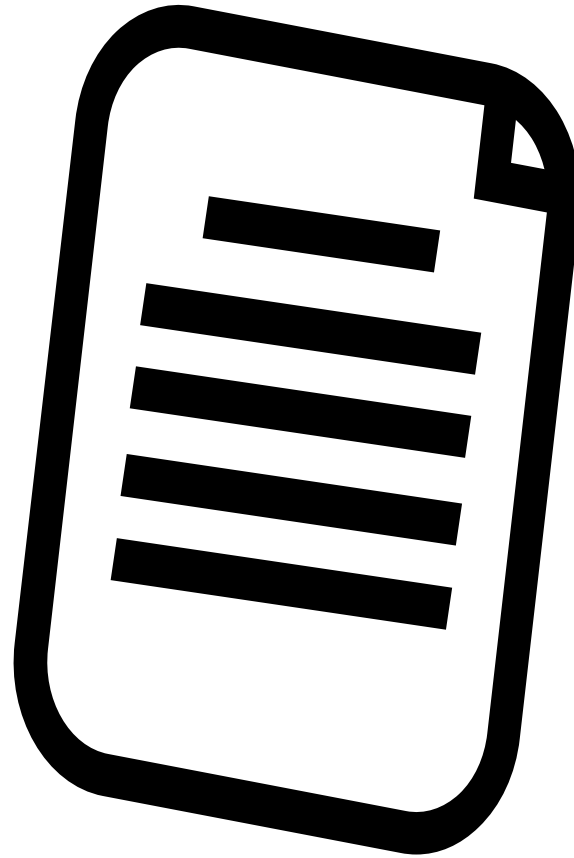
Whole Organization Survey

Key Questions

- Which of these values do you think reflect the bigger mission and purpose of the organization?
- Which of these are most reflected in the work that you personally do?
- As you look at the values in the questions above, which are the 6 most important organization values?



Our Report



How does an organization implement a values statement?



Working with A Trauma-Informed Non-Profit

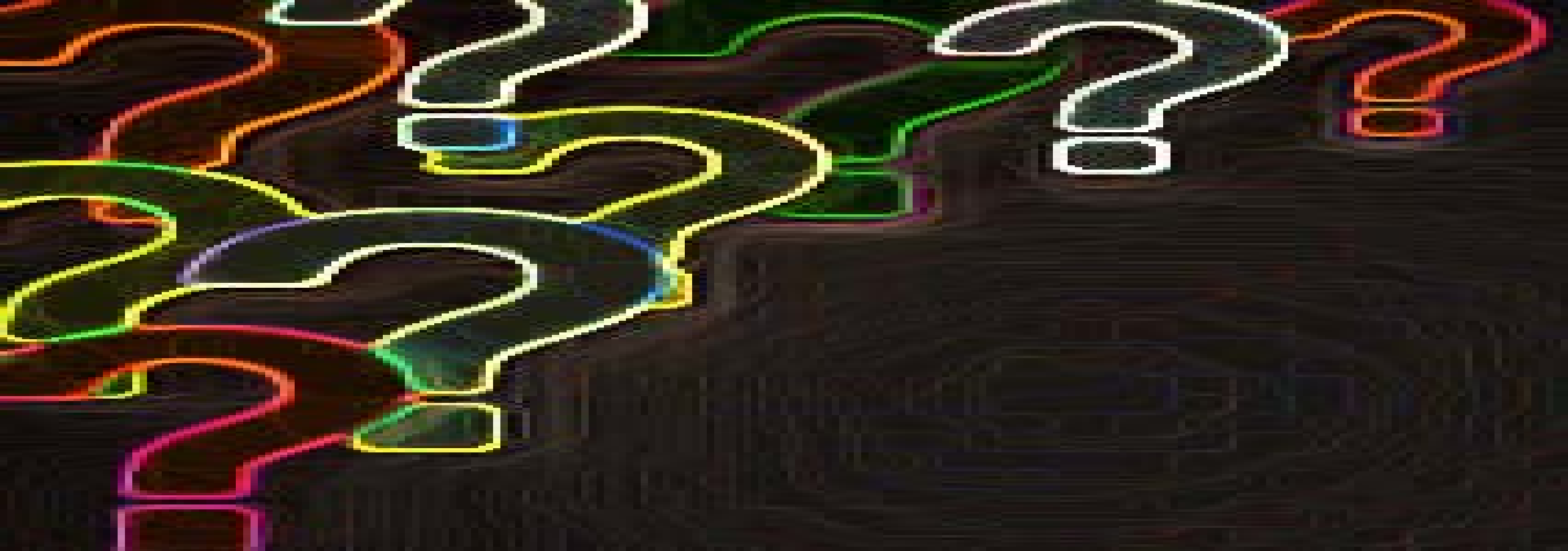
1. Understand TI is at the heart of what is done
2. Check our own assumptions about “what needs to be”
3. Core values:
 1. Safety – physical and psychological
 2. Information sharing
 3. Cultural competency
 4. Respectful communication/good listeners
 5. Predictability and consistency
 6. Involves consumers/clients in the community (no us/them)

https://www.air.org/sites/default/files/downloads/report/Trauma-Informed_Organizational_Toolkit_0.pdf

The Dance of Two Teams

- Mutual respect
- Trust
- Asking when the internal team wanted to take the lead
- Knowing when to leave





Questions?