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ABOUT VALUES LAB

We support and mentor organisations and networks to enhance their effectiveness by identifying, engaging, and giving expression to their core values.

We are particularly concerned to engage and embed values that motivate the promotion of equality, prevention of discrimination, and protection, fulfillment, and respect for human rights.

We believe in the potential of values to affect social change and enable collective action.
PART ONE
VALUES AND
VALUES-LED
ORGANISATIONS
Every organisation is influenced and shaped by particular values. Those values have different sources: the personal values that employees and Board members bring to the work; the founding values and those rooted in the traditions and history of the organisation; the values identified through strategic planning processes; and the espoused values of the organisation’s external stakeholders.

Whether an organisation has a defined set of core values or a general sense of the values it espouses, there can be a disconnect between core values and how the organisation operates day-to-day. This disconnect is often due to core values remaining at the level of abstract concepts rather than functioning as a lens, through which all organisational activities, practices and processes are viewed. In order to address this disconnect, there is a challenge to bridge the distance between having organisational values and living organisational values.

When an organisation is living its values, it is being authentic and true to itself, as it is living its stated purpose. When an organisation is living its values, it is values-led rather than values-based. This publication is for organisations that seek to become values-led.

The values-led organisation ensures ongoing internal dialogue about its core values and develops and applies systems to ensure the organisation is:

- **explicit** in collectively naming, defining and communicating the values that motivate its purpose and work;
- **coherent** in giving expression to its core values in carrying out all of its functions and bringing its values into all areas of its operations; and
- **consistent** in applying its values at all times and in all contexts.

The values-led organisation deploys its values as a lens through which to:

- develop strategic goals and objectives,
- identify priorities and allocate resources accordingly,
- measure progress towards delivering on strategic objectives,
- establish a standard for staff and management practices and behaviours,
- create a benchmark for decision-making, and
- communicate with all stakeholders.

**Take the test**

Can your organisation answer ‘YES’ to these questions?

1. Are your organisation’s core values explicit?
2. Is there a shared understanding of those values across the whole organisation?
3. Is there evidence that your organisation’s core values are embedded in your strategy, processes, and practice?
4. Is your organisation aware of the implicit values operating in the organisation and the extent to which those values might be in direct conflict with your stated core values?

5. Do your core values include values that motivate a commitment to addressing equality and human rights concerns?

If you cannot answer YES to these questions then you may want to consider taking steps to enable your organisation to be values-led. This publication can assist you on this journey.

Values and How They Work

Values are deeply held ideals regarding what we consider to be important. They are key motivators for individuals and for organisations.

Our personal values are key motivators regarding how we want to live our lives. They are central to our self-concept. They each form the wellspring for a specific set of beliefs and attitudes, which in turn drive a large range of actions and behaviours: from the careers we choose and the causes we support, to how we spend our free time and the products we buy. Personal values operate consciously and unconsciously.

Organisational values are central to motivating how an organisation defines itself and how it operates. They are expressed in the culture of an organisation and what it stands for, its internal practice and processes, the actions it prioritises, and how it communicates to its audiences.

Both explicit and implicit values influence organisations. Explicit organisational values are stated core values adopted by the organisation. Implicit organisational values are unstated and not chosen by the organisation as a whole, but nonetheless can have an influence in directing and shaping the organisation.

Implicit values will dominate where desired core values have not been stated and made explicit. Implicit values can also be dominant or evident in the policies, practices, processes and communications of the organisation where the core values of the organisation have been made explicit, but have not been embedded in the plans, processes and practices of the organisation.

There are five important characteristics of values, and how values work, that have implications for organisations and their concern to be values-led:

1. Personal values operate within a values system:

Personal values are best understood as part of an interactive system of values rather than as singular unrelated entities. Within our value system, we will mentally rank our personal values in order of importance, often at an unconscious level, with our highest ranked values being of most centrality to our concept of the ideal self.

Knowing that someone values equality highly, for example, is insufficient to give us the full picture regarding their likely attitudes and behaviour in regard to specific issues. We also need to know where their ranking of equality comes in relation to other highly ranked personal values.


2. Different values we hold will dominate, or wane, in importance, depending on different personal needs or different contexts:

There is an unconscious and conscious balancing of our values to meet our particular needs and to reflect different contexts. When making decisions, people will prioritise a course of action that is consistent with their most highly ranked values. It is not always possible, however, to pursue a course of action that is in complete alignment with our most highly ranked core values.

Take the example of a young adult who places high importance on the value of independence but who is forced to live with her parents due to having a limited income. This person’s security-related values will dominate and their core value of independence will wane. This type of values trade-off is occurring all the time, sometimes at a very unconscious level. It can result in a range of responses, from unease through to anxiety and even depression, particularly where the suppressed value is a highly ranked core personal value.

3. Some values have compatible and opposing motivation: engaging one group of values will suppress values with opposing motivation:

Research in over eighty countries, over several decades, has found that there are a range of values that are universally found, across populations and different cultures. These values can be grouped according to ten distinct types, based on different underlying motivations. These distinct motivations are divided along two dimensions: self-transcendence versus self-enhancement; and openness to change versus conservation.

These dimensions contain values that have conflicting motivation. Self-enhancement values have oppositional motivation to self-transcendence values, and openness to change values have oppositional motivation to conservation values.

Self-transcendence versus self-enhancement reflects the distinction between values that motivate a concern for the welfare of one’s group and wider society, as well as concern to protect the environment, versus values that motivate a concern for personal success and achievement that enhances social recognition and social status. Openness to change versus conservation reflects the distinction between values that motivate a concern for independent thought and action, creativity, and novelty, versus values that motivate a concern for self-restraint, security, and conforming to social norms and traditions.

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6 The term ‘conservation’ here does not refer to ‘conservation’ as this term applies to environmental conservation, but refers instead to conservatism and values associated with a desire to conform to tradition, concern with security, and resistance to change.
Studies indicate that it is psychologically difficult for individuals to simultaneously engage values with oppositional motivation, therefore, when values connected to one type of motivation are being engaged, the values connected to the opposing motivation are being suppressed. When values associated with concern for the welfare of others and protection of the environment are being engaged, therefore, opposing values, associated with concern for the self are being suppressed.

4. Engaging specific values can prompt behaviour aligned with those values and suppress behaviour associated with opposing values:

Engaging specific values prompts people to think and act in ways that align with those values. Furthermore, given that values have compatible and opposing motivations, by engaging values associated with a specific type of motivation, such as self-transcendence values, we are suppressing engagement with opposing self-enhancement values and aligned thinking and behaviour.

In one large-scale UK study participants were invited to consider the work of two organisations, one working on environmental protection concerns and the other supporting people with disabilities. One group of participants was given information about the two organisations that appealed to self-enhancement values (values associated with status, wealth and social recognition). The other group was given information about the two organisations that appealed to self-transcendence values (values associated with concern for the welfare of others and the environment). The latter group were found to be more likely than the former group to subsequently express an intention to offer support to the organisations, such as writing to a Member of Parliament, attending a public meeting, or volunteering with the organisation. A further relevant finding from this study was that the engagement of self-transcendence values was effective in mobilising participants to act in alignment with these values, regardless of how highly they ranked self-transcendence values as being of personal importance.

5. Repeated engagement of values strengthens those values:

Repeated exposure to specific values means that those values are repeatedly being engaged and strengthened, thus prompting behaviours and actions that align with those values. Studies indicate, for example, the impact that corporate advertising has on strengthening self-enhancement values, associated with self-interest, financial success and social recognition.

Similarly, where benevolence values, associated with helpfulness, are engaged, people have been shown to be more likely to donate time or money to a cause.

8 Crompton, T. et al. (2014). No Cause is an Island: How People are Influenced by Values Regardless of the Cause. Common Cause Foundation in association with the Institute of Development Studies. UK
These five features of values and how they work have important implications for organisations regarding how they can harness the potential of their values:

• If the centrality of certain values can shift depending on particular contexts and needs, it is important that organisations are checking which values are prominent in driving the organisation and consequently which core values might be waning in importance.

• If the engagement of specific values encourages aligned behaviour, there is a strong case for organisations to make their core values more explicit in their day-to-day operations.

• If values can be strengthened through repeat engagement, then organisations should be concerned to communicate their core values internally and externally in order to strengthen espoused values with their key stakeholders.

• If engaging specific values suppresses opposing values, organisations working to bring about progressive social change should be concerned to ensure their external communications are engaging the right values to garner support for the change they seek to bring about.

In addition to the evidence, outlined above, regarding the way our values function and the potential this offers at an organisational level, there are a number of additional compelling reasons why organisations should pay more attention to their values.

1. Values-led organisations are more effective:

Organisations in all sectors are increasingly recognising the link between living their values and organisational effectiveness. An examination of the 100 best workplaces in the UK, found that 97% of those organisations were values-led. These values-led organisations benefited, in their effectiveness, from higher levels of trust between staff and management, positive staff perceptions of organisational integrity and credibility, and high staff ratings for management follow-through on values.

In the 1990’s, Collins and Porras undertook a six-year research process to identify what makes a truly exceptional company different from other companies. Their research focused on eighteen US companies that they defined as ‘visionary’ based on the following criteria: a company which has stood the test of time, is a leader in their field, is widely admired by their peers, and has a long track record of making a significant impact on the world around them. A key issue that emerged was the role of values in making these companies effective. Visionary companies were more likely to be effective and enduring as a result of their adherence to a core set of values, rather than because of an innovative product or simply making money. Core values were found to be what shaped the identities and cultures of the companies and were critical in sustaining those companies in the face of change.

12 Great Place To Work, (2014). Organisational Values. Are they worth the bother? How values can transform your business from good to great. Great Place To Work Institute UK.
VALUES AND VALUES-LED ORGANISATIONS

2. Organisations need to ensure their core values are prominent in shaping and driving organisational priorities, practices and processes, given that implicit values can otherwise have a significant influence:

Every decision that an organisation makes will reflect the set of dominant values at work in that organisation. Explicit values and/or implicit values will ultimately shape organisational culture. The quality of the work and the organisation’s impact ultimately depends on ensuring that core values are predominant.

Organisations, even those that explicitly name their core values, rarely take the time to reflect on their values and ensure their values are dominant in shaping and driving the organisation. This can be due to several factors, including:

- An assumption that core organisational values are operational without any explicit naming or monitoring of these values,
- An assumption of a shared understanding of core organisational values among Board, management and staff, and how those values should be given expression in their work.

3. Organisations working for social change and the common good seek to promote values aligned with this change:

Organisations in civil society and in the public sector readily acknowledge their work as values-based, given their concern to contribute to social change and the common good. This concern includes an interest in promoting and strengthening societal values that are aligned with the organisation’s values and that will contribute to achieving the social change or common good they aim for. This underlines the importance of communicating and engaging their values through their work of service delivery, awareness raising, advocacy, campaigning, training, and fundraising. These communications need to harness the potential of values as a vehicle to drive this change.

Values-based communication connects with people on an emotional level, as values are strongly connected to feeling and emotion. Values-based communication can engage people more effectively than fact-based communication. Communications on social and environmental issues can often be heavily fact-based. This reflects a belief that if we simply give people the facts they will change their opinion and support the cause in question. In reality, however, when the facts being communicated do not fit a person’s particular framing of the issue, then those facts will largely be ignored or dismissed without having effect. Research indicates that values-based framing of messages has been more effective in engaging people on issues and then motivating them to take action14.

Communicating the values we want to promote strengthens those values in our audiences. When people are regularly reminded about particular values they are more likely to think and act in ways that are aligned with those values. There is empirical evidence that aligning our communications with the values we wish to promote has the potential to strengthen those values among our audience base15. Research has shown, for example, that engaging values associated with care for the environment, subsequently prompted research participants to behave in ways that aligned with environmental

The more our communications engage our audiences with values associated with concern for others and the environment, the more likely we are to strengthen behaviour aligned with those values, in wider society.

The civil society landscape is diverse and fragmented. This reflects the focus of organisations and groups on the specific needs of different groups, communities, and issues, to address discrimination, inequality, poverty, social exclusion, human rights and environmental concerns. While responding to this diversity of groups and issues is important, nonetheless without care, it can militate against solidarity and impact.

A common set of core values concerned with equality, social justice, and human rights underpins this work in its diversity. These values are a thread of connectivity between diverse civil society groups and organisations and can serve as a basis for linkage and alliance building, and through this, greater impact.

Similarly, values offer potential for public sector bodies to build linkages with civil society organisations in progressing shared objectives. Values also offer a vehicle for public sector bodies to develop the kind of joined up government that is regularly called for on a number of key issues that straddle the remit of several areas of government.

**Barriers to being values-led**

It is a challenge for organisations to live their core values consistently. Every organisation will at some point face different threats to their core values. Organisations in civil society and the public sector face a number of particular challenges with regard to being values-led. These barriers require careful management if these organisations are to sustain values-led approaches to their mandates.

Key barriers facing civil and public sector organisations to being values-led:

- Civil society organisations providing frontline services on behalf of the state, often experience funder pressure to focus on service provision, to the exclusion of pursuing their social change agenda. This causes a tension for organisations in terms of living their core values of social justice, equality and human rights.

- Civil society organisations reliance on state and philanthropic funding can often give rise to chasing funding for projects that may not completely align with core values. In addition, reliance on state and philanthropic funding brings certain terms and conditions that may, over time, result in the adoption of the values of the funding organisation, which may not align with core organisation values.

- Processes of reform pursued in the public sector have lead to a reprioritising of values as well as the adoption of new values. Two decades ago the values of ‘equity’ and ‘integrity’ were cited as dominant public sector values, whereas, in more recent times, the values of ‘efficiency’

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‘cost-reduction’ and ‘value-for-money’ dominate, with an increasing emphasis on efficiency and value-for-money. A re-balancing would be required to reassert the focus on values concerned with the common good alongside those values concerned with efficiency and cost.

- The persistently insecure nature of funding for organisations in civil society can result in the dominance of survival values: relating to sustainability and financial security. This can lead to a values-shift, where survival values take precedence over values associated with external connectedness, building external partnerships and social change. Survival values can also dominate in a public sector organisation that has experienced significant cutbacks, insecurity of funding, and merging of organisations over the period of economic crisis.

The Importance of Equality and Human Rights Values

Equality and human rights values have a central importance for organisations across all sectors:

- Attention to equality and human rights concerns in the workplace enhances organisational performance. Research has shown that organisations characterised by equality and diversity benefit from increased creativity, productivity, and staff retention.

- Equality and human rights are central to the social change pursued, and common good sought, by civil society and public sector organisations. Research has shown that almost everyone does better in societies characterised by greater equality.

- Irish public sector bodies are now subject to a statutory duty to have regard to the need to eliminate discrimination, promote equality and protect human rights in carrying out their functions.

The following core values are suggested as central values underpinning and connecting the goals of promoting equality, preventing discrimination, and protecting, respecting and fulfilling human rights are suggested:

- **Autonomy**: encompassing choice, agency, freedom, and self-determination.

- **Democracy**: encompassing participation, voice, empowerment and accountability from those in positions of power.

- **Dignity**: encompassing respect, relationships of care and love, and human worth.

- **Inclusion**: encompassing a sense of belonging and community, interdependence, collective responsibility and a valuing of diversity.

- **Social Justice**: encompassing redistribution of wealth, income, jobs and social goods and the absence of privilege and entitlement.

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22 The Irish Equality and Human Rights Commission Act 2014. s42.

Some of these values should ideally hold a place among the core identified values of organisations. This is not to replace other core values, but a matter of balance. These values need to share prominence with other core values in shaping organisations and their work so that they can contribute to the gains of a more equal society and a more effective organisation.

A values-led approach offers potential for Irish public sector organisations to discharge their obligations under the public sector equality and human rights duty. The five values identified as underpinning equality and human rights, offer a framework to approach implementation of the duty in an integrated manner, thus avoiding a siloed or tick box approach to the duty.

PART TWO

BECOMING VALUES-LED: TOOLS AND PROCESSES
This section sets out a number of tools and processes, developed by Values Lab, to support organisations to lead with their values.

**TOOLS:**
- Values Audit
- Values Proposition

**PROCESSES:**
- Systems audit
- Values working group/champions
- Values impact assessment
- Communications audit
- Workplace environment

**KEY PRINCIPLES IN EMPLOYING THESE TOOLS AND PROCESSES:**

- A whole-organisation approach should be adopted in using these tools and processes. Where an organisation is developing a core set of values for the first time, the Board of Directors should be involved in the process from the outset in implementing a Values Audit or Values Proposition.

- While the tools and processes constitute discrete elements of work for an organisation in becoming values-led, it is recommended that each would build on the next as a comprehensive approach to embedding and living core values.

- The implementation of each tool and each process takes account of, and is relevant to, each of the functions of an organisation, including: employment, service provision, procurement, communications, advocacy, campaigning, and fundraising.

- The tools and processes are implemented in a manner that recognises and takes account of the diversity of internal and external stakeholders.

**TOOLS TO SUPPORT ORGANISATIONS TO BECOME VALUES-LED**

**VALUES AUDIT**

The Values Audit tool provides a valuable starting point, or point of renewal, for organisations seeking to lead with their core values.

The audit sets the groundwork for the organisation to: develop a shared understanding of how values work; gain greater clarity in regard to the values that have prominence in driving the organisation; and understand how to enhance the focus on core values and give them greater expression in organisational actions, practice and processes.
BECOMING VALUES-LED: TOOLS AND PROCESSES

**PURPOSE:** the Values Audit is designed to take the values pulse of the organisation in order to determine which values currently have prominence in driving organisational practice, processes, outputs and outcomes.

**PROCESS:** the Values Audit comprises the following stages:

1. Values Audit survey
2. Values Audit workshop
3. Values Audit report

**STAGE 1.**

**VALUES AUDIT SURVEY**

**Objective:** to establish staff perceptions of the values that currently have prominence in driving the organisation and to assess the extent to which those values are congruent, or in conflict with, stated or desired core organisational values.

**Approach:** the survey is administered anonymously to all staff. It is divided into two sections: the first focusing on the personal values held by staff and the second focusing on staff perceptions of the values currently driving the organisation.

Section 1. Core personal values

Survey respondents are prompted to think about their personal values. They are then invited to identify up to ten values that they believe are their core personal values. From this list, respondents are asked to identify three values that are central core personal values.

Section 2. Prominent organisational values

Survey respondents are prompted to consider which values they perceive to be prominent in driving the organisation. They are invited to choose a maximum of five values that they believe are currently the most prominent values driving organisational actions and practice and to ascribe a meaning to each value chosen.

Respondents are asked to identify specific examples of where they see evidence of the five cited values, in the organisation’s:

- Results (outputs and outcomes),
- Processes (organisational systems and practice), and
- Relationships (between internal and external stakeholders).

The survey information is analysed with particular regard to the following:

- the range of motivational ideals that individuals bring to the organisation, by way of their core personal values, as a starting point for further exploration of:
  - congruence between personal and stated core organisational values,
  - potential in personal values for organisational effectiveness.

- the range of values staff perceive as having prominence in the organisation as a starting point for further exploration of:

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25 A list of values is appended to the survey that respondents can chose from, or they can identify a core value that does not appear on the appended list.

26 As for section 1. of the survey, a list of values is appended to the survey that respondents can chose from, or they can identify a value that does not appear on the appended list.
PART TWO

• the range of values cited, and the shared perceptions in relation to particular values or groups of values,
• whether there is balance in the identified values being in evidence, across results, processes and practices of the organisation, and shared perceptions in this regard,
• whether the identified values have prominence in driving each of the functions of the organisation and where stated core values are prominent or absent, and shared perceptions in this regard,
• congruence between the values cited and the stated core values of the organisation, and shared perceptions in this regard,
• an indicative list of core values emerging, where the organisation has not previously identified its core desired values.

• input and discussion on the information from the values survey,
• group exercises, based on the values survey data analysis, to enable the organisation to:
  o develop a clear picture of the values seen to be prominent in driving the organisation, the manner in which those values are shaping operations, and any key issues in this regard,
  o reflect on core organisational values, where these have been previously identified, to determine where they have prominence and any gaps or issues in this regard,
  o reflect on and identify a potential set of core values, where the organisation does not have stated core values, that could be agreed as the core desired values of the organisation,
  o support the organisation to become familiar with their stated or desired core values, by taking what are abstract value concepts and concretising them into specific results, outcomes, processes and practices, and
  o understand the implicit values operating in the organisation and the extent to which those values might be in conflict with stated or desired core values.

• input and discussion on threats to, and enablers for, core organisational values, and
• discussion to draw out conclusions for the organisation from both the values survey data and the workshop exercises.

STAGE 2.
VALUES AUDIT WORKSHOP

Objective: to facilitate staff (and Board members as appropriate) to explore the concept of values and to reflect on the strengths, challenges, and opportunities (which can be identified through the values survey) that would enable the organisation to become values-led.

Approach: a facilitated workshop with staff members covering the following:

• input and discussion on the concept of values: how values work, and the characteristics of the values-led organisation,
STAGE 3.
VALUES AUDIT REPORT

Objective: to provide the organisation with a set of observations, arising from the survey and workshop material, to support them in becoming values-led.

Approach: the audit report comprises analysis of the values survey data and the workshop outcomes. The report sets out a number of key observations for the organisation to consider if it is to progress to becoming values-led.

The audit report concludes the Values Audit process. While the three stages of applying the Values Audit tool can act as a stand-alone process, these stages also create the conditions for further action, including providing a basis to:

- agree a core set of values for the organisation, where core values have yet to be agreed,
- create the conditions for the organisation to deepen its work to embed core values across all its operations,
- monitor the implicit and explicit values driving the organisation and avoid a values-shift towards non-core values,
- develop a Values Proposition to further embed a values-led organisational approach.

VALUES PROPOSITION

The development of a Values Proposition constitutes a further stage in becoming a values-led organisation, and can build on the outcome of a Values Audit.

PURPOSE: the Values Proposition is a tool to support the organisation to apply core values at key moments, in particular: planning; project/service development and delivery; human resource management; communications; stakeholder engagement; and monitoring, review and evaluation.

PROCESS: the development of the Values Proposition comprises the following stages:

Stage 1. Facilitating the organisation to develop a draft Values Proposition
Stage 2. Discussing and agreeing the Values Proposition
Output: a Values Proposition

STAGE 1.
FACILITATING THE ORGANISATION TO DEVELOP A DRAFT VALUES PROPOSITION

Objective: to facilitate the organisation to agree its core values and the objectives, processes and practices that would give expression to those values.

Approach: a facilitated session with staff to:

- identify, refine, and/or agree the core values of the organisation,
- build consensus around:
  - shared definitions for the core values, that establish the organisation’s own meaning for each value,
  - a statement of objective for each value, setting out the direction of action, for the organisation, that each value suggests,
  - a statement of process for each value, setting out the approach of the organisation to carrying out its work, that each value suggests,
  - a statement of practice for each value, setting out how core values will be reflected in staff and management practice and behaviours.
The content of the session will be shaped according to: the outcome of the Values Audit; whether a previously agreed set of core organisational values exist, and if some of those core values require further discussion and amendment; or whether core organisational values have yet to be identified and agreed.

STAGE 2. DISCUSSING AND AGREEING THE VALUES PROPOSITION

Objective: to consider and agree a final draft of the Values Proposition and explore how it might be applied by the organisation.

Approach: a facilitated session with staff to:

- present, finalise and agree the draft Values Proposition,
- assess the Values Proposition against the outcomes of the Values Audit report (if conducted) to explore how the organisation will respond to opportunities, threats, and challenges in building and sustaining a values-led approach, and
- identify steps to be taken by the organisation to ensure it can effectively deploy the Values Proposition to live its values explicitly, consistently and coherently.

Being values-led requires on-going and sustained work by the organisation. This is particularly important in the early stages when staff is becoming familiar with the language of values and how to effectively insert core values into their work.

The Values Proposition allows the organisation to concretise its core values. This process of concretising core values is vital in bridging the gap between a core value remaining at the level of an abstract ideal to a concretising of the value in terms of what it suggests for organisational priorities, processes and practice.

STAGE 2. DISCUSSING AND AGREEING THE VALUES PROPOSITION

Objective: to consider and agree a final draft of the Values Proposition and explore how it might be applied by the organisation.

Approach: a facilitated session with staff to:

- present, finalise and agree the draft Values Proposition,
- assess the Values Proposition against the outcomes of the Values Audit report (if conducted) to explore how the organisation will respond to opportunities, threats, and challenges in building and sustaining a values-led approach, and
- identify steps to be taken by the organisation to ensure it can effectively deploy the Values Proposition to live its values explicitly, consistently and coherently.

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PROCESS TO SUPPORT ORGANISATIONS TO BECOME VALUES-LED

Once the organisation has concretised its core values, through the development of a Values Proposition, there needs to be an embedding of this process so that the organisation’s core values are strengthened and the work continues to be values-led. Five processes are identified here, to support the organisation in this regard.

1. Systems Audit

An audit of internal systems can support the organisation to live its values explicitly, consistently and coherently. This audit would...
BECOMING VALUES-LED: TOOLS AND PROCESSES

be based on the Values Proposition and would reflect a deployment of the Values Proposition at a systemic level. This is important to ensure core values are applied in a sustained manner to the breath and depth of the work of the organisation.

This process would include:

- a review of key organisational systems to ensure they are coherent with the values and statements set out in the Values Proposition,
- inserting an explicit focus on core values in organisational systems (recruitment and employment; staff management and appraisal; planning, monitoring and evaluation; formal communications (internal and external); programme and service design, development and delivery; fundraising and finance),
- inserting an explicit focus on core values in organisational structures (Board level; senior management level; and regarding internal and external working groups and stakeholder committees).

2. Values Working Group/Values Champions

Establishing new structures, or designating specific responsibilities, to drive and monitor a values-led approach can be useful for organisations. This is particularly so for larger and more complex organisations.

A values working group and/or values champions could be identified to strategise, support, monitor, and evaluate the organisation’s work to embed and lead with its core values. Their role could include the following:

- supporting and driving the ongoing communication of, and commitment to, the Values Proposition within the organisation and externally,
• assessing the likely impact of the plan, policy, programme, procedure or initiative on each of these objectives, and

• making a decision on the adequacy of this impact across the full set of statements of objective for the core values and amend the plan, policy, programme, procedure or initiative to enhance or achieve the impact required.

4. Communications Values Audit

Communicating values helps to strengthen the core values of the organisation with key audiences and, consequently, can increase the likelihood that they will be motivated to support the issues of concern the organisation might want them to take action on. This requires that organisations pay particular attention to embedding core values in their communication processes, strategies and activities. A communications values audit can assist in this.

A communications values audit would involve:

• Auditing all communications: website, promotional materials, campaign messaging and visuals, press releases, policy and research documents, position papers, and fundraising materials, to:

  o ensure core values are being communicated,
  o ensure imagery and messaging is coherent with the core values of the organisation,
  o avoid appealing to values that might undermine or be in opposition to the core values of the organisation,
  o identify creative ways to communicate the core values of the organisation.

• Incorporating core values creatively in the language, messaging and imagery of campaigns, policy submissions, fundraising, and information to promote programmes and services.

5. Creating a workplace environment that supports a values-led approach

There is a challenge to build and sustain an organisational culture that reflects the organisation’s core values. The people in an organisation are the main pillar for such a culture. It is their behaviour, practice, and ways of relating, that will determine whether core values flourish. Those in leadership roles are particularly critical to building this culture.

A values-led culture is one where staff is reminded of the core values and supported to reflect core values in their practice and interaction with colleagues and external stakeholders. A values-led culture can be built and sustained by:

• including a focus on values in the recruitment, selection and induction of Board members, staff and volunteers to ensure a person-fit with core values,

• inserting a values-focus in staff support and appraisal processes,

• using team and management processes to monitor organisational culture from the perspective of core values,

• celebrating and communicating actions, practice and behaviours that are exemplars of living organisational values,

• team-building initiatives to specifically focus on core values and values-led practice,

• communicating core values through internal communication channels, and

• visually displaying core values in the workplace to engage and strengthen core values.