



VII. Establishing Strong Values and Energizing Culture – “Must Do” for All Nonprofits These Days

Strong values and energizing culture are essential for success. Values are what you believe: values guide you in *everything* you do. Culture is how you behave: culture is *oil* or *sand* in your engine.

Worksheets for strong values and energizing culture

1. Strengthening Our Core Values – What We Stand For
2. National Cultures – Introduction to Organization Culture
3. Current Culture – Initial Assessments of Our Current Behavior
4. Consensus about Our Current Culture – How We Behave
5. Our Desired Culture – How We Will Behave for Success
6. What Might Prevent Us from Achieving Our New Culture – Barriers
7. What Should We Do about the Barriers We Identified – Solutions
8. Cheerleaders and Plans – Leaders for the Change

Strong Values and Energizing Culture

- **Values** are what you believe most deeply as the fundamentals that guide you in everything. They are the beliefs, norms and concepts that shape an organization and identify what you expect staff, board members, volunteers and participants to believe.
- **Strong Values** are the core values needed to prevail in the complex world we face today.
- **Culture** is how you behave and how you work together for success. It is the glue that binds people together as the strategy that gives them a similar way of behaving.
- **Energizing Culture** gets everyone working together enthusiastically and joyfully.
- **Vision** is your dream or ideal world.
- **Mission** is what you do to work toward that ideal.
- **Goals** are destinations in 3 to 5 years. **Objectives** are measurable achievements this year.
- **Strategy** is the road map or how to achieve your goals and objectives.

This planning tool presents a process to review and strengthen your core values to make them strong core values and to get an energizing organization culture for everyone. It is important that the process be open and honest and fully involve people to assure their commitment to the end results. The analysis should build on the history, research, plans, and discussions and especially on the vision, mission, goals, objectives, and strategies you have agreed. Each step below includes individual reflection, small group discussion, and then full group consensus building. The final conclusions should have the support of everyone involved.

1. Strengthening Our Core Values – What We Stand For

Begin by thinking individually and then in small groups about the big changes in the world and in your work within the framework of your new strategic directions. Ask “What are the big changes in world and the need for our work? What are the implications for us? What is holding us back?”

Civil society and NGOs are under attack in many countries. Even where they are well accepted, support in funding has not been anywhere high enough to meet the needs NGOs are addressing. In many countries, donations by wealthy people are a small portion of their incomes or net worth.

It is right to take a deeper look at values. We need a more “defining and non-forgiving approach” to identify and operationalize values with a more direct focus on a “non-negotiable” standard. We need statements of what we expect and embrace – as well as statements of what we reject, cannot tolerate, and what we will speak against. And the courage to do so! We need to stand up for the strong core values we hold, make sure they are for a better world, incorporate them into our programs and advocacy, and insist they are not negotiable with staff, board members, partners, elected officials, and the public. NGOs want to do more to make a better world. We must stand up for what we believe and what we want to accomplish.

Plans are essential, but without strong core values and energizing culture, they will fail. That is why it is absolutely essential to assure you have identified strong core values and create a culture that will energize everyone to achieve the results you identified in your strategic and operational plans.

My slogan is “Working together for a better world through strategy, teamwork, and leadership.” I want to emphasize the great potential of translating values and culture into more effective work to make a better world. Although most well-functioning nonprofits do quite well in living their vision, mission, and strategies, they need to bring values and culture to be front and center in all they do.

Promotion of your cause, public education about your cause, and advocacy to support your cause are basic attributes or responsibilities of a nonprofit organization dedicated to the public good. Strong core values will activate your organization’s non-negotiable beliefs through ongoing and new promotion, education, and advocacy campaigns as well as strengthening program services. The other fundamental attributes of nonprofits – maintaining your independence and free voice and maintaining your voluntary nature – are also essential as you translate values into work. You need to exercise your freedom of speech and show the strength of your convictions (values) by speaking out, even when it may be controversial or unpopular, because it is right and important. By being supported through voluntary contributions, you will have a higher credibility than if you were funded by a special interest group. By translating strong values and energizing culture into work, I know you can achieve more to have greater impact.

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To address values, first think about big changes in world and work. Write down your group conclusions in box 1 below. Reconvene the full group plenary for presentation of the small group conclusions. Discuss and reach plenary consensus on big changes in world and work for box 2.

| 1. Big changes in World and Work - <i>Group</i> | 2. Big changes in World and Work - <i>Consensus</i> |
|---|---|
| | |
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The changes in world and work have implications for the organization’s core values. Review your conclusion in the planning for core values. It is worth reconsidering them so reflect individually for five minutes – ask yourself “What are our core values as we move forward? What do we value the most? What guides us? What do we stand for? Will we be courageous?” Then discuss with the others in your small group to identify a group consensus. With the needs in the world today, I believe that your core values statement will need to be strengthened. Discuss and reassess everyone’s views to be certain. Then enter the small group consensus in box 3 below.

Reconvene in plenary for a full discussion of the various group reports. Ask “What are our core values? Why do we believe these are our most important values? Do our vision, mission, and values fit perfectly? Are they strong enough?” Enter the consensus of your new strong values in box 4 below. If you think your values are already clear and strong, just spend some time here reviewing, discussing, and confirming them openly.

| 3. CORE VALUES REVISITED – <i>Group</i> | 4. STRONG VALUES AGREED - <i>Consensus</i> |
|---|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |

This becomes your core values statement and it is included in your strategic plans, proposals, evaluations, website, posters, and other important documents.

2. National Cultures – Introduction to Organization Culture



Consider how different countries have different cultures. For example:

- Canadian: peaceful, orderly, respectful, friendly – land of order
- American: life, liberty and the pursuit of happiness – land of opportunity
- Mexican: family and personal relationships – land of personal connections
- French: égalité, fraternité et liberté – land of philosophy and culture

Activity: In your mind, imagine how you define your own national culture in just a few words, compared to the culture of a neighboring country. Talk to a colleague and identify key cultural traits. Write a few descriptive phrases that define the national culture for the two countries.

Our Own National Culture

Another Country's Culture

| | |
|----------|-------|
| 1. _____ | _____ |
| _____ | _____ |
| 2. _____ | _____ |
| _____ | _____ |
| 3. _____ | _____ |
| _____ | _____ |
| 4. _____ | _____ |
| _____ | _____ |
| 5. _____ | _____ |
| _____ | _____ |
| 6. _____ | _____ |
| _____ | _____ |

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3. Current Culture – Initial Assessments of Our Current Behavior

Think individually about how everyone currently behaves in your organization. Ask yourself what you say to yourself when you are happy and when you are complaining about others. What behaviors are rewarded? Punished? Select 5 to 8 adjectives from the list on the two pages below that you feel are most descriptive of your current culture.

Check them in the **NOW** column. Please add new adjectives for any other behaviors or traits you experience. Once you have checked 5-8 descriptions in **NOW**, go to the next section. [Hold off on **DESIRED** until later.]

| | NOW | DESIRED | | NOW | DESIRED |
|------------------------|------------|----------------|------------------|------------|----------------|
| Accountable | | | Individualistic | | |
| Action oriented | | | Innovative | | |
| Ahead of the curve | | | Inward looking | | |
| Aiming high. | | | Just and fair | | |
| Allowing initiative | | | Last minute | | |
| Ambitious | | | Learning | | |
| Authoritarian | | | Merit based | | |
| Behind the curve | | | Mission driven | | |
| Blaming | | | Negative | | |
| Boss centered | | | Nurturing | | |
| Bureaucratic | | | Old fashioned | | |
| Can do | | | Open | | |
| Caring | | | Organized | | |
| Catch up | | | Participative | | |
| Chaotic | | | Passion for work | | |
| Cohesive | | | Paternalistic | | |
| Collaborative | | | Political | | |
| Committed | | | Positive | | |
| Competent | | | Proactive | | |
| Competitive externally | | | Problem thinking | | |
| Competitive internally | | | Professional | | |

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| | <u>NOW</u> | <u>DESIRED</u> | | <u>NOW</u> | <u>DESIRED</u> |
|------------------|------------|----------------|--------------------|------------|----------------|
| Complacent | | | Quick to criticize | | |
| Complaining | | | Racist | | |
| Cooperative | | | Respectful | | |
| Creative | | | Responsible | | |
| Crisis mentality | | | Responsive | | |
| Critical | | | Results oriented | | |
| Cutting edge | | | Rigid | | |
| Dedicated | | | Risk avoiding | | |
| Disdainful | | | Safe | | |
| Divisive | | | Secretive | | |
| Dynamic | | | Self-satisfied | | |
| Efficient | | | Sharing | | |
| Elitist | | | Solutions oriented | | |
| Energizing | | | Structured poorly | | |
| Enthusiastic | | | Structured well | | |
| Entrepreneurial | | | Stuck | | |
| Fast acting | | | Supportive | | |
| Firefighting | | | Synergistic | | |
| Flexible | | | Taking initiative | | |
| Formal | | | Technocratic | | |
| Founder driven | | | Tradition bound | | |
| Hardworking | | | Transparent | | |
| Hierarchical | | | Trusting | | |
| Helpless | | | Troubled | | |
| Not ... | | | Unsafe | | |
| | | | | | |

Be sure to add new words to describe your current or desired culture if they are not here. Review your list and narrow it down to the most dominant behaviors that influence work and progress. The process in this section should take anywhere from a thirty to sixty minutes. You can compare notes with a neighbor if you wish.

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What is our organization culture? Is it sand or oil in our plan? Example of good culture



The Spirit of Childreach

- Passion for the global mission.
- Commitment to growth and being the best.
- Obsession with quality and customer service.
- Let everyone shine.

4. Consensus about Our Current Culture – How We Behave Now

Based on your individual conclusions in the **NOW** column above, write down the 5 to 8 words that, in your opinion, define the organization culture as it is now in the left column below (good, bad, ugly, and great!) Then talk in your small group to gain consensus about the 5 to 8 most dominant traits in your culture now. Write the conclusions as the consensus of your group in the right column below. Highlight the most dominant behaviors.

| HOW WE BEHAVE NOW – My View | HOW WE BEHAVE NOW – Group Consensus |
|-----------------------------|-------------------------------------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |

Then all the groups come together, share their conclusions, and develop a consensus of everyone involved. The best way to do this is to get one behavior from each group and go around to the groups in turn collecting a conclusion from each, in priority order from each group. At any point, a group can say “We agree with that.” Combine behaviors that are similar in a single description.

Based on input from everyone in the organization or their representatives, this is the statement of your organization's current culture.

HOW WE BEHAVE NOW – CONSENSUS OF EVERYONE IN THE ORGANIZATION

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|----|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |
| 6. |
| 7. |
| 8. |

5. Our Desired Culture – How We Will Behave for Success

Use the same process to define what you believe you need as an organization culture in the future in order to energize everyone to achieve the results you want. Start with the long list of words in section 3 above and any new terms you want to include and check them in the **DESIRED** column. As you do this, think of new conditions, new values, new goals, and new work in your operations for the coming 3 to 5 years. You probably want keep or strengthen some current behaviors and you will probably need to add new behaviors to accommodate the new realities and new priorities. Write the new set of desired behaviors from your individual viewpoint in the left column below; then discuss in your group to get the group consensus in the right column.

| HOW WE NEED TO BEHAVE - <i>My View</i> | HOW WE NEED TO BEHAVE – <i>My Group</i> |
|---|--|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |

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After each group has identified the desired new energizing culture it believes is important to support the new plans, get everyone back in the larger group to work for consensus. Use the same process as before to optimize participation.

This is your agreed new statement of your organization culture.

| HOW WE NEED TO BEHAVE – OUR NEW ORGANIZATION CULTURE – <i>Confirmed</i> |
|---|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |
| 6. |
| 7. |
| 8. |

6. What Might Prevent Us from Achieving Our New Culture – Barriers

You can do this in full group or the small groups. Write down or call out any problems, impediments or barriers you see in achieving the new culture. Compile, discuss, and simplify the list. Especially for small and medium-size groups, this could be done in the full plenary right after the completed statement of the desired new culture in a free-flowing brainstorming session. This does not have to be a precise list as it will be refined by a special culture planning group.

BARRIERS WE MIGHT FACE – *barriers suggested for consideration*

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7. What Should We Do about the Barriers We Identified – Solutions

Find solutions to the barriers. This might include talking about how you want everyone to behave and treat each other, how you would like to remind others and be reminded yourself to live the new culture, what should be rewarded and what should be un-rewarded, and how you all should treat external stakeholders. Brainstorm in the full plenary or groups about possible solutions.

POSSIBLE SOLUTIONS TO OVERCOME BARRIERS – proposals

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8. Cheerleaders and Plans – Leaders for the Change

The smarter organizations I have worked with have implemented a follow-up approach including a specific plan of action and a group of culture champions. I have seen these work.

The first step is to create a team which is tasked to draft a clear operational plan on values and culture with objectives and activities, deadlines and responsibilities, and indicators of success and moments of celebration. The activities may include meetings and reminders, posters and visual aids, awards and recognition, internal memos, a bell in the middle of the table, various reminders, entries in job descriptions, regular feedback and annual reviews, hiring notices, orientation materials, and other steps to support the desired culture. This objective and plan become part of your operational plans.

The second step is to identify or ask for volunteers to be cheerleaders or culture champions. Who are your champions? What can they do to embed the new values and culture in everyone’s daily behavior and all your activities? How do you support them? How will you reward them?

The third step is to get the values and culture included in every department’s and every individual’s operational plan of action; that is, how do you ‘operationalize’ your values and culture? How do you put your values and culture foremost in daily activities? How do you communicate them and promote them to your stakeholders, the media, officials, and adversaries?

WORKSHEET: DRAFT A PLAN OF ACTION TO IMPLEMENT THE NEW CULTURE

Objective: To live our new strong values and energizing culture in our work each day.

Our strong core values are

Our energizing culture is

Our activities, responsibilities, and deadlines are

Our indicators of success are:

I have seen the tasks of the culture team, planning group or champions defined as follows:

1. Draft a plan with objectives, activities, responsibilities and deadlines
2. Meet as a group for sharing, learning, planning, and mutual support
3. Support the new culture as essential for development and success
4. Gather information on the process, problems and progress
5. Be the spokespeople for the process (not the supervisors)
6. Coach staff and help them through the stress of change
7. Promote and cheerlead the new organization culture
8. Facilitate open communications about culture and barriers encountered
9. Use positive reinforcement and recognition to encourage adoption of the culture
10. Confront negative comments with plans and perspectives agreed by the planning group
11. Make sure everyone includes values and culture in their operational plans for each year

Skills and Requirements: Desire to help shape the organization's future; Accepting the challenge and commitment to be a champion; Willingness and ability to be a role model of the new culture; and Enthusiasm and willingness to stand up for values and culture.

Please see or review chapter 4 on “Core values as non-negotiable beliefs and the foundation of everything” and chapter 14 on “Translating values and culture into work” in my book *Strategic Planning and Culture for Nonprofits*. They provide useful guidance as you proceed.