



**governance**hub

# living values

a pocket guide  
for trustees

community  links

# Living Values: a pocket guide for trustees

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## *Living Values*

The material in this pocket guide is drawn from *Living Values: a report encouraging boldness in third sector organisations* published by Community Links.

This project brought together 12 people from a range of organisations (third, private and public sectors) to research the topic of values with us. We spoke to over 100 people. This guide focuses on the messages from this work for trustees.

The full report is available free from [www.community-links.org](http://www.community-links.org)





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# Introduction

It is often claimed that the distinguishing feature of organisations in the third sector is that they are value-driven. In the world of the busy organisation struggling to deliver its work in a challenging environment, do values help? Do they matter? We believe they do, now more than ever. Organisations can feel overwhelmed by the challenges they face or they can shape their own futures. Values are the solution.

As a trustee you have tremendous responsibilities: you must make sure the organisation is well run, accountable and solvent but your most important, and most exciting, responsibility is to uphold the mission and values of your organisation. This guide looks at the findings of *Living Values*, a research project carried out by Community Links on values in third sector organisations, and highlights the implications for trustees. Case studies and exercises are included to help you to put values at the centre of your organisation's activity.

This little book will fit in your pocket. We hope you take it with you to trustee meetings and use it to support you and your colleagues to be creative and bold as you make your values live.



## What are values?

Values can be hard to capture in concrete and practical ways. When we ask people why they give their time to third sector organisations we find their answers fall into three categories, and these provide a solid definition of what values are.

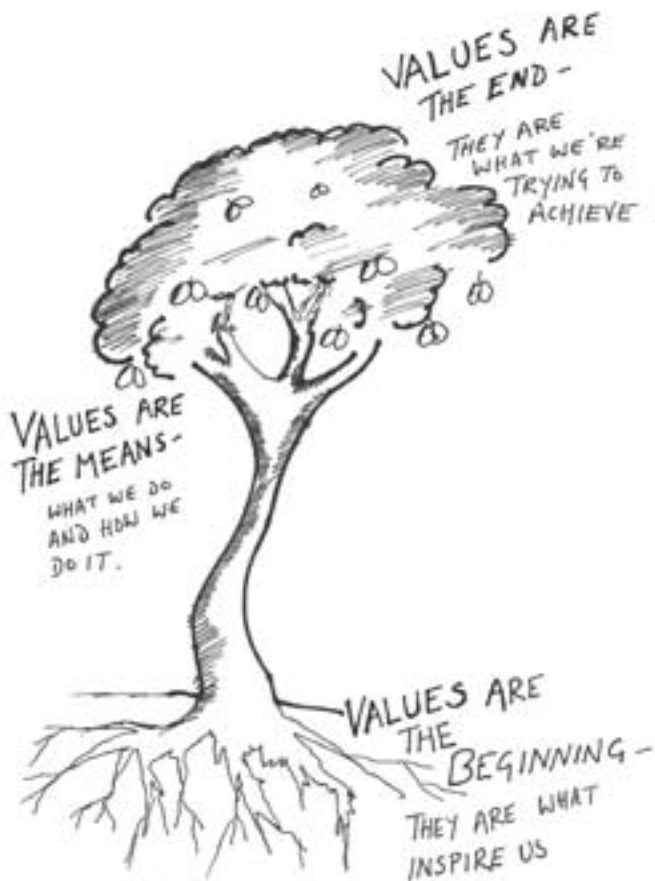
**Values are the beginning** – they are what inspire us: for example being driven by the desire to support people to increase control over their own lives.

**Values are the means** – they determine what we do and how we do it: for example planning and delivering work using approaches that encourage initiative and self-help.

**Values are the end** – they are what we are trying to achieve: for example bringing about a society where everyone can play their part.

“Values drive every bit of work we do”

*Living Values* participant



# Living Values and the implications for trustees

## Background

The third sector has always existed in the midst of forces that variously shape, support and threaten its work. We felt that now, more than ever, there are pressures acting on the sector which have the potential to change what the sector does and how it does it. These pressures are experienced differently by organisations that are small and large, local and national. At a time of change, we felt it was important to revisit what makes us special – our values.

## Findings

1. We found that there is a set of values that are meaningful to third sector organisations. These are:

- ▶ empowering people
- ▶ making voices heard
- ▶ being responsible
- ▶ doing a good job
- ▶ pursuing equality
- ▶ transforming lives
- ▶ finding fulfilment
- ▶ generating public wealth

2. These values inspire people to work and volunteer in the third sector. If organisations are to continue to inspire people to get involved as paid workers, volunteers and trustees, then they have to be able to passionately demonstrate these values.
3. Separately these values are present in the public and private sectors. However the way in which third sector organisations combine and prioritise these values is unique.
4. There are forces that have the potential to change the values of the third sector. Of greatest significance is the funding environment where organisations find it increasingly difficult to attract funds for what they want to do, in the ways they want to do it.
5. The organisations that navigate these forces successfully are those that passionately focus on their values. However, these forces are not the biggest threat to the sector.

6. The biggest threat to values comes from within. It lies in organisations not focussing on values, chasing funding that does not fit with values, allowing values to be influenced by others outside the organisation and allowing the demands of running an organisation to overshadow values.
7. There are practical things that third sector organisations can do to put values at the centre of every activity.

The implications of these findings are particularly important for trustees. As leaders of organisations, it is your responsibility to make values live.



BUT, THEN AT  
LEAST WE GOT OUR  
FUNDING...

VALUES

## Making values live

Discovering that the biggest threat to values comes from within is challenging, but optimistic. There are practical ways in which trustees can ensure their organisations put values at the centre of every activity:

**Talk about values** – values must be discussed and debated, and kept in the front of the minds of everyone involved with the organisation, internal and external.

**Build every activity on your values** – every part of the organisation has to think about what values mean for how people behave, how ideas are formed, how work is planned and how it is delivered.

**Measure your work against your values** – delivering values requires work on measuring whether and how this is being achieved.

If an organisation is doing all three of these, each enhances the quality of the others.



actions

## Talk about values

- ▶ Make sure you know what the values of the organisation are. If there is no values statement, make sure this is on the agenda at the next trustees meeting.
- ▶ Ensure that everyone else in the organisation knows what the values are and that people talk about them and review their work against them. Everyone in the organisation has to be involved. Don't assume they know already.

## CASE STUDY

Barton Hill Settlement in Bristol reviewed their values as part of the strategic planning process. A Board member was paired with a senior staff member and they completed a values diagram (see Exercise 1, page 22). The exercise stimulated a challenging and rewarding discussion which helped trustees and staff to understand each other, their motives and their values better. It led to two fundamental shifts in their work; one to be more dynamic and the other to give more emphasis to tackling the causes of issues in their area not just the effects. [www.bartonhillsettlement.org.uk](http://www.bartonhillsettlement.org.uk)

- ▶ Practice talking about values passionately and persuasively. Words are powerful. Use them to inform and inspire.
- ▶ Identify the people outside the organisation that you need to help deliver your purpose, from heads of local authority departments to independent funders. Help them very deliberately to know, understand and appreciate your values. Their commitment to your work and their desire to support it in appropriate ways grows from this foundation.

“It’s about keeping your own flame burning and then being quite systematic about revisiting the values and making sure they are underpinning what you are doing. Each organisation has to do this for itself”

*Living Values* participant

## Build every activity on values

- ▶ Trustees must be assertive about being the guardians of the organisation's values. Boards must constantly ask people working in the organisation how activity is contributing to these values.
- ▶ Explicitly focus on values in recruitment and induction of trustees, paid staff and volunteers.

### CASE STUDY

The Revolving Doors Agency leads the Partners in Reducing Re-offending Programme (PiRR) which helps small charities to work together to attract service contracts from the government's National Offender Management Service (NOMS). A big concern for PiRR was that delivery agencies would have to report any service user that broke the terms of their offender agreement to NOMS. The charities told NOMS this would compromise their values and that this was more important to them than the funding. NOMS listened and agreed to recognise the role of non-coercive interventions. By sticking to their values, these organisations were able to implement their values even more powerfully. [www.revolving-doors.co.uk](http://www.revolving-doors.co.uk)

- ▶ Test each organisational decision against values. Basing strategies and plans on values, rather than fitting decisions to the conditions imposed by those outside, will inevitably reflect values.
- ▶ Use a range of ways to support the promotion of values across the organisation. For example bring trustees, volunteers and paid staff from across the organisation together and use the exercises in the back of this guide to stimulate discussion about values.
- ▶ Collaborate with organisations that share your values. Identifying the values that underpin a successful project helps to identify good collaborators.

“We have organisational conferences. They are a good source for organisational values. These get-togethers reaffirm what we are doing, helping you to feel you are working on the same thing.”

*Living Values* participant

## Measure your work against your values

- ▶ Measure what you do in ways that demonstrate the impact of your values. What difference do your values make to the quality of your work?
- ▶ Answering this question will mean going beyond outputs and developing ways of assessing wider changes in people's lives such as increased confidence or even happiness.

### CASE STUDY

Off the Streets and into Work developed an employability map having recognised that for the majority of its client group different ways of measuring progress towards employment were needed. The map consists of five areas relevant to employability: motivation, lifestyle, readiness for work, basic skills, and skills for finding work. Each area comes with a detailed description of behaviours and client and worker agree where the client currently sits. Creating the first map works like an initial assessment and highlights areas for work. It then feeds directly into planning and is reviewed regularly to capture progress. [www.osw.org.uk](http://www.osw.org.uk)

- ▶ Review your projects and if they are not delivering your values look hard at what you are doing and why you are doing it.
- ▶ Measure the process of delivery as well as the end result. If one of your values is 'empowering people', look at whether your projects work in ways that are empowering. Being 'informed' by values is not enough, values need to be embodied in our actions.

“Proving your effectiveness gives you legitimacy. It gives you your right to sit at the table, because you know the needs you are tackling and that you do a good job. This in turn gives your users and your supporters greater confidence in you. And it gives your organisation confidence not to be pushed around.”

*Living Values* participant





tools

# Talking about values

## Exercise 1 – Making a values statement

(for individuals and groups, 60 minutes)

1. Give participants a selection of statements of values or about values as a starting point. (You can find a ready-made list in the ‘things to do’ section of the *Living Values* report at [www.community-links.org](http://www.community-links.org))
2. Ask them to read all the statements and select the ones they feel are most meaningful.
3. Give them a big sheet of paper and ask them to stick the statements down in the form of a diagram. You can draw on the diagram, or use lines to connect things or write in statements that you think are missing.
4. Discuss the diagrams.

## Tips

Be clear that you are asking about your organisation – what values it has / should have.

Think about who to involve. Bringing together a group of trustees and frontline staff is a good way to create links across the organisation.

Think about how the session will end and what you will do afterwards.



# Building every activity on values

## Exercise 2 – From general to specific

(for groups, 30 – 60 minutes)

1. Write one of the organisation's values on a piece of flipchart paper.
2. Ask what strategies you have / need in place in order to deliver this value.
3. Ask how this results in projects or services that deliver this value.
4. Ask how strategies and projects support everyone in the organisation to behave in ways that are consistent with this value.
5. Note these answers on the flipchart and discuss.

▶ value

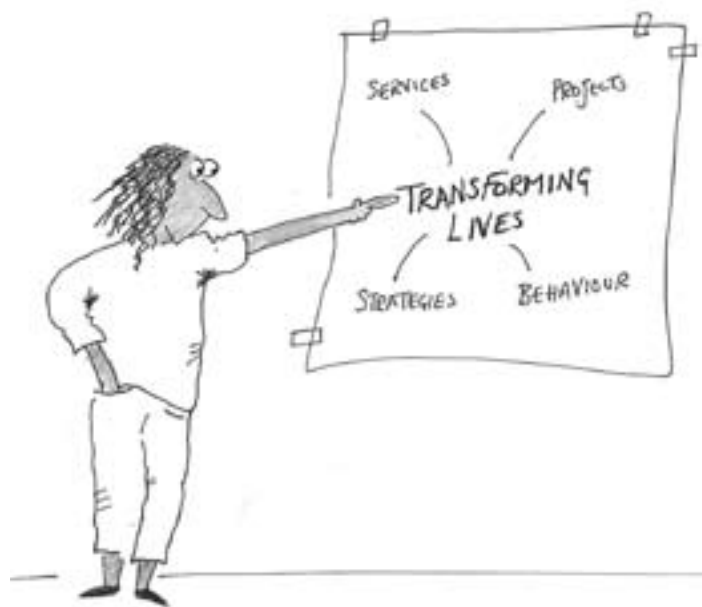
▶ strategies

▶ projects and services

▶ behaviour

## Tips

This is a useful exercise for strategic planning. Prepare an example to help participants see how it works.



# Measuring your work against your values

## Exercise 3 – An organisational CV

(for individuals or groups, 60-90 minutes)

1. Imagine that the organisation's values are a job description. Imagine that your organisation wants to get the job of delivering those values. With practical examples, you need to demonstrate how your organisation puts each of these values into action.
2. Write each value on flipchart paper and give everyone a pen. Ask them to write up examples.
3. If lots of different examples are listed under each value, ask people to vote for the best ones.
4. Look at the values that don't have many examples of how you deliver them – why not?
5. Write the CV that will get your organisation the job.

## Tips

This exercise will benefit from input from across the organisation at all levels.

As on a CV it's useful to show a track record over a number of years.

You can see Community Links' CV on our web-site.



# Things that make you think about values

## Exercise 4 – Other ways of talking about values

(for groups, 15 minutes)

1. On a piece of flipchart paper write “Things that make me think about values” and the following headings.

Pieces of music

Books

Films

Places to visit

People

Web-sites

2. Give everyone pens and ask them to fill in their own examples under each heading, and say why they have chosen them. At one session, under films someone wrote ‘The Wild Angels – not necessarily for all the hell raising, but just for line “We want to be free, to do what we want to do” because this would be a good opening line for our next funding application.’
3. Talk about what people have listed.

## Tips

This works well as an activity during a break in a meeting.



## Last word

As a trustee, you are the guardian of your organisation's values. Now is a time of change, opportunity and threat. Trustees must help their organisations to make choices that reflect values. Talking about values, building every activity on values and measuring activity against values are the key to moulding, rather than being moulded by, the forces that are exerted on your organisation.

The work of the third sector sits alongside the contribution of other sectors, we claim no moral high ground, but we believe that the approach is distinctive and valuable. We need to go beyond the vague assertion that we are value-driven and we need to be able to demonstrate this with confidence and authority.

Third sector organisations, led by their trustees, have to take responsibility for making this happen. No-one else will do it for us.



## About *Living Values*

The *Living Values* report was launched at a national conference in June 2006. Since then we have developed training and consultancy materials and spoken about the findings at conferences and workshops. We are working with a range of organisations, from large to small, from different parts of the sector and across the country to support them to make their values live.

We are keen to hear about what you think of this pocket guide. Do you have examples of how you make your values live that will inspire and encourage others? We would be pleased to hear from you.

The full report is available free from  
[www.community-links.org](http://www.community-links.org)

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W [www.community-links.org](http://www.community-links.org)



## The Governance Hub

The Governance Hub exists to improve governance within the voluntary and community sector in England by:

- increasing the supply of trustees
- enhancing trustee learning and development
- strengthening and extending support services for trustees

[www.governancehub.org.uk](http://www.governancehub.org.uk)

Helpdesk: 0800 652 2886

## Community Links

Community Links is an innovative charity running community-based projects in east London. Founded in 1977, we now help over 53,000 vulnerable children, young people and adults every year, with most of our work delivered in Newham, one of the poorest boroughs in Europe. We pioneer new ideas and new ways of working locally and share the learning nationally through publications, research, policy development and consultancy.

[www.community-links.org](http://www.community-links.org)

