

**ESTABLISH YOUR**

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# **VALUES**

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**A Guide to Creating and Integrating  
Values into Your Organization**

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## HOW TO USE THIS GUIDE

This is a working guide — we hope you will fill in the blanks and do the exercises as you read it. Values become critical to the long term success of your organization. The guide is for you to use and review, then bring to a meeting and set aside time to work as a team on your values. It's important — plan on at least an hour to focus on your values and how you will use them!

### ✓ WHY ARE VALUES IMPORTANT?

#### BECAUSE THEY GUIDE YOUR ORGANIZATION

Values are important because they reflect how your organization acts, which can attract business (or destroy business)! They are specific to the culture of your agency and a great reflection of what your organization stands for in your daily work.



HELPING YOU FILL IN THE BLANKS

## **EXERCISE:**

Think of a business or organization you admire.

List what you think are their most important values:

## **✔ WHAT ARE VALUES?**

**THEY ARE AN EASY WAY TO TELL YOUR STORY.  
AT A GLANCE, PEOPLE WILL KNOW WHAT  
IS MOST IMPORTANT TO YOU.**

Values represent what is most important to your organization. They are physical manifestations of how you do business, how you act every day. Think of your values as an everyday approach to living your life. They are driven by your leadership as a staff person or Board member. Values are demonstrated in everything that you do. They are your guiding principles — and are critical to your success!

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**"Values aren't buses. They're not supposed to get you anywhere. They're supposed to define who you are."**

**- Jennifer Cruise**

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## **HELPFUL HINT:**

There should be between 4-6 core values that reflect your culture.

# EXAMPLES OF VALUES

Every great organization has established values, and there are some great examples out here. Maybe you even have some personal values that you hold important. To get you thinking about values, here are some:

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**PERSONAL VALUE EXAMPLES: HONEST, TRUSTWORTHY, ACCOUNTABLE**

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**CUSTOMER SERVICE VALUE EXAMPLES: RESPONSIVE, POLITE, FRIENDLY**

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**ORGANIZATIONAL VALUES: TEAMWORK, INNOVATION, QUALITY**

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## EXERCISE:

Remember those organizations you admire? Look them up on line and list their top values:

<b>ORGANIZATION NAME</b>	<b>VALUES</b>
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## **READY, SET, GO: ESTABLISH YOUR VALUES!!**

Now that you know why values are important, what they are, and have some good examples, it's your turn!

### **EXERCISE:**

Answer these three questions about your agency (you can use short words or phrases or write it out as a sentence, whatever works):

**WHAT IS IMPORTANT TO US?**

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**WHAT IS UNIQUE ABOUT WHAT WE DO EVERY DAY?**

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**WHAT DEFINES US OR SETS US APART?**

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Now, list your top 6 words or themes you see in your answers.

**HELPFUL HINT: these will become your values!**

### VALUE

One final piece: you need to define what your values mean. So take your most important values and explain them as if you were talking to a young child.

### DEFINITION

## ☑ **WHEN YOU MEET AS A TEAM**

Hopefully all the members of your team (Board and staff) have used this guide and done the exercises. Now, it's time to create your shared team values.

BRING THIS GUIDEBOOK to the meeting!

## **SUGGESTED AGENDA**

**INTRODUCTIONS AND QUICK SHARING  
OF INFORMATION - 30 SECONDS EACH  
WRITE DOWN YOUR TOP VALUES - 5 MINUTES  
LAST MAN STANDING - 10 MINUTES  
SHARE DESCRIPTIONS - 10 MINUTES**

**PRIORITIZE VALUES - 5 MINUTES**

**DEFINE VALUES -10 MINUTES**

**BRAINSTORM IMPLEMENTATION -10 MINUTES**

**ACTION STEPS - 5 MINUTES**

## **MEETING SUPPLIES**

- Pens
- Large sticky notes
- Markers for white board Flip Charts
- Colored dots

## **TEAM MEETING INSTRUCTIONS**

- ✓ **INTRODUCTIONS:** Keep it short and interesting (why you are here, something about you that would surprise everyone)
- ✓ **WRITE DOWN:** Write each important value (from your guidebook exercises) on a sticky pad (write with big marker, one value to a sticky pad... spelling doesn't count!).
- ✓ **LAST MAN STANDING:** Everyone in the room lines up in front of the flip chart and one by one, puts one value (one sticky note) on the flip chart. Then to the "back of the line" and the team member next in line puts one value on the board. If it's the same value just stick it right on top. Continue until everyone is done.
- ✓ **SHARE DESCRIPTIONS:** Define your values so everyone is on the same page. Volunteer to read your definition to the group so everyone understands what each value means.
- ✓ **PRIORITIZE:** Vote on the top 4 values! Take 4 sticky dots and put one on what you think should be the most important values of your team.
- ✓ **CONSENSUS CHECK:** Make sure the group agrees on your top 4...and agrees on the definition.... and give yourselves a round of applause. Nice work!
- ✓ **BRAINSTORM IMPLEMENTATION:** Now that you have values, how will you implement them? How will you demonstrate them? Have one person write on the large flip charts, shout out ideas in a brainstorming fashion.

- ☑ **ACTION STEPS:** None of this will help unless you actually DO something with your implementation ideas. Be specific: who in the room is going to do what, and by when?

## **HOW TO COMMUNICATE AND IMPLEMENT VALUES**

Congratulations! You've created some that will guide you as you make decisions, reflect your culture, and send a statement to the people with whom you work. Now.... how do you actually USE your values in what you do every day? There are lots of easy ways to implement values.

**ACT ON THEM DAILY** ask yourself in meetings "Does this decision meet our values?"

### **POST THEM ON YOUR WEBPAGE**

**MAKE THEM A VISUAL ARTIFACT** make posters, create postcards, put them on your correspondence, put them on your business cards

**MAKE THEM FUN** put your values on a mug! Have goofy awards around values.

### **EVALUATE YOUR PROJECTS WITH YOUR VALUES IN MIND**

### **HIRE STAFF AND SELECT NEW BOARD MEMBERS THAT UNDERSTAND AND EXEMPLIFY YOUR VALUES**

#### **EXERCISE:**

List three ways you will implement values into the work you do daily:

- 1.
- 2.
- 3.



# Sheryl Trent



With over 28 years of local government (cities and counties) experience, Sheryl Trent is one of fewer than 45 Certified Master Facilitators in the world.

Her real life experience which includes managing strategic plans, comprehensive plans, massive capital projects, economic development agencies, Urban Renewal Authorities; as well as her non profit board experience gives her a unique understanding of the needs of her clients. She designed SBrand Consulting to “help fill in the blanks” for her clients: local governments, special districts, nonprofits and other agencies. She and her team of experts travel across the country designing a customized process grounded in proven methodologies to create strategic, sustainable success



## READY TO PLAN?

### FREE CONSULTATION

#### ✓ FREE ONE-ON-ONE CONSULTATION WITH SHERYL

We appreciate the time and interest that you have committed to our presentation. To show our appreciation please call to set-up a FREE consultation. Personalized consultations include project estimate, time-line and a map of deliverable objectives.

EMAIL SHERYL TODAY: [sheryl@sbrandsolutions.com](mailto:sheryl@sbrandsolutions.com)

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This space is for you to take notes, write down questions, or list your favorite ideas to share.

## **NOTES**

# WHAT WE DO

RESULTS BASED STRATEGIC  
PLANNING

BOARD AND TEAM DEVELOPMENT

**CONSENSUS**

**FOCUSED**

**FACILITATION**

COMMUNITY AND STAKEHOLDER  
ENGAGEMENT

HELPING YOU FILL IN THE BLANKS

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