



TOOL | ESTABLISHING VALUES AND PRINCIPLES FOR WORKING TOGETHER

TIME REQUIRED: 60 MINUTES

Most collective impact and collaborative efforts benefit from establishing a core set of values and principles for working together. The time spent upfront agreeing to a core set of values and principles can save time over the course of the collaborative when sticky situations arise.

USING THIS TOOL WILL HELP YOU:

- Understand the importance of values and principles for collaborative efforts
- Build an approach to considering values and principles
- Access resources to help this conversation

OVERVIEW

Agreeing upon a core set of values and principles for collaborative efforts can be incredibly useful when the collaborative group has to deal with conflict. This core work should be done early when the group is forming. Values and principles can be used to drive decision-making and can shape the collaborative culture. **Values are social norms** – they are personal, emotional, subjective and arguable. **Principles concern human behavior** and govern how people work together. Values and principles can be woven together to create a core document which will govern the collaborative effort. This four-step tool will help collaborative groups create their values and principles document.

THE TOOL

STEP ONE: ARTICULATE THE VALUES

Most collaboratives will identify 4 – 6 core values that they want their collaborative to operate under. There are countless types of core values and it is important to identify those core values which are best suited to the outcomes of the collaborative effort. It is natural to want to include

a long list of core values, but limiting the selection will help focus the shared mission or common agenda without becoming too distracted. Below is a list of core values to consider.

Equity	Inclusion	Transparency	Fairness
Responsiveness	Dependability	Efficiency	Commitment
Open-Mindedness	Innovation	Creativity	Compassions
Positivity	Optimism	Respect	Courage
Learning	Service to Others	Environmentalism	Consistency

STEP TWO: IDENTIFY THE IRRATIONAL RULES, POLICIES AND PROCEDURES

While this might seem counterintuitive, identifying the rules, policies and procedures that have a negative impact on morale or create unnecessary obstacles to working together can help the group identify how they do not want to work together. This can be a fun step as individuals will identify what has irritated them in the past. Toss out the rules, policies and procedures which will take the collaborative away from achieving their outcomes.

STEP THREE: DEVELOP THE PRINCIPLES

The guiding principles should spring from the values the group has selected. The principles should define how the collaborative expects the members of the group to behave or work together.

Example - Equity: Our collaborative effort will include and involve individuals directly impacted by the issue we are trying to resolve. Their voices and experiences will be valued and inform our decision-making processes.

STEP FOUR: APPLY THE VALUES AND PRINCIPLES

A practical strategy for applying the values and principles is to review the most recent decisions made by the collaborative table. Have the group reflect on whether these decision processes reflect the values and principles statements. To what degree were the decisions consistent with the values and principles? What changes can be made?

In future decisions, events or strategies, use the values and principles as a lens for decision-making. Here are some core questions for collaborative groups to consider:

- Are these events, strategies and decisions consistent with our values and principles?
- How will this decision impact our collaborative efforts and outcomes in one, three or five years?
- What is the possible impact this could have on how our collaborative members behave and feel about our collective efforts?

Developing a set of core values and principles to govern your collaborative process involves conversation and connection. Be sure to build in enough time to dive into this conversation and hear all voices in the room. Values and principles build the collaborative culture and are instrumental for high performing groups.

Adapted from Source: Four Steps to Creating Principles and Building a High Performance Workplace - <https://www.makeadentleadership.com/four-steps-to-creating-principles.html>

PRINCIPLES FOR USING THIS TOOL

- Build enough time into your process to have the values and principles discussion. You might want to consider dedicating a meeting to this conversation.
- Make sure that all voices in the room are heard and considered. If your group is large (over 10 participants), you might want to break into smaller groups to engage everyone.
- Follow all the steps in the process. You will learn what is important to individuals and what is not.
- Document the process. This will provide a good orientation for individuals who might join the collaborative later.
- Apply the values and principles to this process and ask, were we consistent in our approach?

THE TOOL IN PRACTICE

The Collective Impact Forum has identified values and principles for Collective Impact efforts. These Principles of Practice provide a great starting point for collaboratives.

Do not adopt these principles without first having a discussion about their relevance to your Collective Impact work. It is important for the collaborative table to have a discussion about the values and principles which are important to them. If you skip this step, it will be more difficult to apply the values and principles when a conflict arises.

Here is a link to the Collective Impact Principles of Practice – <https://www.tamarackcommunity.ca/latest/collective-impact-principles-of-practice>.

DIVING DEEPER

The difference between values and principles - <https://medium.com/the-mission/the-difference-between-principles-and-values-789b95452422>

Four Steps to Creating Principles and Building a High Performance Workplace - <https://www.makeadentleadership.com/four-steps-to-creating-principles.html>

Values and Principles of Community Development - <http://www.ohcc-ccso.ca/en/courses/community-development-for-health-promoters/module-one-concepts-values-and-principles/values->

Collective Impact Principles of Practice - <https://www.tamarackcommunity.ca/latest/collective-impact-principles-of-practice>.