

Cultivating Values for Shared Decision-Making

Purpose of This Tool

The shared decision-making process can be applied to unit-wide project priorities, organizational guidelines development, launching of new practices, financial situations, and performance review activities. The application of shared values in decision-making does not equate with consensus building, but this practice supports a collaborative approach that can help your team speak into certain decisions.

Ultimately, the coming pages support your team in selecting shared-values to inform this new practice for your organization. There are three parts to this tool:

Part I. page 2

Part II. page 6

Part III. page 8

We are excited for your success with adopting this practice! For further questions about the implementation of this tool or related inquiries, please contact admin@AnchoringSuccess.com.

Cultivating Values Part I

Time commitment: Independently, each staff member spends 1- to 2-hours reading through definitions of values, drafting the values and explanations, and then submitting Word document attachments (i.e. refer to the template) by email to the supervisor leading the activity.

The lead supervisor invests 2 to 3-hours consolidating all of the feedback from the staff team, aggregating the same or highly similar values and explanations. The goal here is for a concise, clean, easy to read summary (i.e. refer to the template). This summary will be used in Part II.

Purpose of the activity: Our daily work guides our forward momentum of advancing the impact of our work. As organizations make the implicit features of their work more overt (i.e. program descriptions, revised job descriptions, evidence of outcomes, etc.), the coherent link between everyday tasks and group values will ensure coherency across this diverse group and fast-paced professionals.

What is the end goal? At the end of Part I, II, and III of this activity, your team's shared-values will inform an official practice for decision-making on those topics that are appropriate for shared decision-making such as project priorities, guidelines within various units, launching of new ideas, and regularly occurring performance appraisals.

Choose from the following values pool, but feel free to go looking for a few more options:

1. Integrity
2. Boldness
3. Honesty
4. Trust
5. Accountability
6. Commitment to Audience
7. Passion
8. Fun
9. Humility
10. Continuous Learning
11. Ownership
12. Constant Improvement
13. Leadership
14. Equity
15. Innovation
16. Quality
17. Teamwork
18. Simplicity

Homework: Every member of the team selects the top three to four values that they envision should guide the work and temperament of the organization (or a specific department) for the next five years. Then, draft a definition of each selected value, articulating what that value is. Finally, in one to two sentences for each value, quickly describe an example of where/how/when the value is lived out or you would like it to be lived out, in your real-life, day-to-day work.

Template for Homework

Which 3 to 4 values should guide group decision-making?	What is the definition of the value?	Where/how/when is the value lived out?
1		
2		
3		
4		

Email this document to the lead supervisor who is guiding this activity.

Template for Aggregating Staff Feedback

Which values did staff members submit?*	What are the key points that staff shared about the importance of this value?**	How many times did this value show up across the submissions?
1	<ul style="list-style-type: none"> • - • - • - 	
2	<ul style="list-style-type: none"> • - • - • - 	
3	<ul style="list-style-type: none"> • - • - • - 	
4	<ul style="list-style-type: none"> • - • - • - 	
6	<ul style="list-style-type: none"> • - • - • - 	
6	<ul style="list-style-type: none"> • - • - • - 	

*Refer to the sample use of this template.

**Many times, people use different names for the same value. This can be detected when closely reading the staff members' homework on definition statements and explanations of where/how/when the value is alive (or should be alive) in their work. Unite the same value names in the first column, but bullet point the key phrases used by staff members.

Print and project on a screen this summary at the next group meeting to start Part II of this activity.

Sample: Template for Aggregating Staff Feedback

Which values did staff members submit?*	What is the definition and key points that staff members shared about the importance of this value?**	How many times did this value show up across the submissions?
1 Fun/Amusing/ Silly/Whimsical	<ul style="list-style-type: none"> • Already present among team. • Can empower our team through the sometimes grinding work as well as empower our colleagues that we coach and train. 	2
2 Continuous Learning/Discovery/ Exploration/ Innovation	<ul style="list-style-type: none"> • Core to eval work. • Creates trust with colleagues. • Helps us to stay relevant. • Constant innovation is already occurring 	6
3 Humility	<ul style="list-style-type: none"> • Supports collaboration. • Creating equitable spaces requires this. • Finding a leadership-server identity. • Take ownership over how we treat others and ourselves. 	4
4 Integrity	<ul style="list-style-type: none"> • We adhere to best social-scientific practices regarding data collection and data analysis. • Having a strong moral and ethical code. • We handle a lot of sensitive information and are trusted to act wisely. 	3
5 Leadership	<ul style="list-style-type: none"> • We do our work for ensuring systemic change around organizational practices. • Leadership is a service to the organization. 	2
6 Commitment to Audience/ Service	<ul style="list-style-type: none"> • Meeting the needs of colleagues. • Providing high quality advice, with integrity, honesty, and trust. • First and foremost, working in service of our institution. • Proactively addressing opportunities and needs. • Taking adequate time to understand context before offering teaching, advice, resources, etc. 	4
7 Equity	<ul style="list-style-type: none"> • This should be embedded in everything we do, from language access to evaluation and data governance. • Being just when providing resources to address an issue. 	3
8 Accountability/ Ownership	<ul style="list-style-type: none"> • We have a fiscal responsibility to be accountable to how we use funds. • We clearly outline and communicate the responsibilities we take on, and we are accountable for them. • We must hold ourselves accountable to best-practices. 	3

Cultivating Values Part II

Time commitment: The entire team spends 1-hour together to review the summary provided by the lead supervisor (i.e. refer to the subsection “What Do We See?”). During this meeting, the goal is to reduce the list to only 3 to 4 values. If 1-hour is not enough then schedule a second conversation meeting; spending more than an 1-hour at a time can become exhausting and destroy the positive buzz around developing the practice of values-based decision-making.

Purpose of the activity: The act of compiling a team’s proposed values is time consuming. It requires reading, reflecting, grouping, and condensing. Within this resulting list, there are few values in the list that could be argued as not relevant to our work, but arguments can be made about which values help us to do our work in the most effective and efficient ways.

What is the end goal? Reduce the values list 3 to 4 values that the entire team agrees are relevant to making workplace decisions. At this point, the team will be ready for Part III.

What Do We See?

For a 1-hour meeting, it is important to be coherent and exploratory, experimenting on which values make the most sense for workplace decision-making (refer to the subsection “What Do We Do with Our Values?” to envision these types of decision scenarios).

First, it is important to reflect on the diversity of proposed values. Consider the following:

- 1 | Which values are reflected in our current job descriptions and program goals/foci?
- 2 | Which values are predictive of our future, where we want to get to?
- 3 | Which values can be further combined under a single name?
- 4 | Which 1 to 2 values are important, but cannot actually be implemented for decision-making? (Refer to Part III if you need to think about this further.)

Reflect outloud with the entire team with the intended outcome of reducing the list by a few of the values. The facilitator prompts the staff members using these questions and asking staff members for ways to reduce the list to a solid 3 to 4 values.

Before finalizing the decision of which values to let go of, consider how the values will be put to work...

What Do We Do with Our Values?

The following decision-making process questions will be applied to unit-wide project priorities, guidelines development, launching of new practices, financial situations, and performance review activities. These questions and applying our shared values are not a consensus process, but they support a collaborative approach that can help our team inform unit-wide decisions.

Decision-Making Process Questions

- 1 | When a decision needs to be made, which option(s) mirrors 3+ of our values?
- 2 | What is the concrete evidence that the option(s) mirrors our values?
- 3 | When an option(s) does not mirror our values, are there other redeeming qualities within the option(s) that should be elevated above our values?
- 4 | Which consequences 3, 6, and 12 months into the future may occur from the chosen option(s) that may actually not mirror our values?
- 5 | What resources are needed for engaging the option(s) and are these resource needs also in alignment with our values?

Diagramming the Decision-Making Process Questions



Cultivating Values Part II

Time commitment: The entire team spends 1-hour together to practice using the chosen values for shared decision-making. This meeting is very important to creating further clarity for the team, ensuring that everyone has the same definition of the value and how they will be expected to support its use during share decision-making sessions.

Purpose of the activity: Practice implementing the values before the actual use of the values in shared decision-making.

What is the end goal? The staff team is fully supported and prepped for implementing this new practice.

Finalizing Our Shared Values, Worksheet

In order to ensure that the chosen three to four values adopted by the team are in fact the best options, the team must consider how the actually implement of the values looks real work life. In the scenarios below, test-out how well each of the values applies to decision-making. Through the course of this exercise if the team notices that a value chosen from Part II doesn't meet their need, return to Part II and reassess the complete list of values; this is a common experience for many organizations. Don't worry, if your team returns to Part II, this means that the team is astute and careful about building this new organizational practice!

Decision-Making Scenarios

Scenario 1 //

When five new colleagues joining the organization from a range of professional backgrounds, we realize that we have no unit guidelines for ensuring confidentiality with the information and data that we work with everyday. A few team members propose developing a confidentiality guideline and agreement form that we all sign to show we understand the importance of the confidentiality practices.

Scenarios 2 //

The organization is invited by a major software company to consult with them and client organizations to build data literacy within these client organizations. The company will pay the consulting costs to your organization. There is excitement in the organization as well as questions about sustainability of such a workload.

Scenario 3 //

The organization runs out of money for supplies and travel in February 2020, but three colleagues have not had a chance engage in professional development activities. There is a need for a creative fund development strategy, but what should be in that strategy as guided by our values?

Reflection Before You Leave the Meeting

When the 1-hour meeting is almost done, pause the discussion and respond to the following reflection questions:

1 | Do the 3 to 4 values from Part II still stand as a good match for your organization's shared decision-making? (i.e. Did your team need to return to Part II to reassess which values are actually useful for decision-making?)

2 | Which of the 3 to 4 values were the easiest to practice using in the scenarios? What about these values made them easy to use? Can these "easy" factors be implemented with the more difficult to use values?

3 | How much more time does the team need to finish establishing this practice for shared decision-making within your organization? (i.e. Schedule the next meeting, if needed.)

Notes
