
Creating core values statements

Goals of this activity

- To help you to collaboratively identify and define, as a group, the core values that underpin your work together.
- To support deeper conversations about what behaviors are acceptable and unacceptable in a team, community, or organization.
- To provide the underpinnings for the creation of a code of conduct/community participation guidelines, the implementation of those guidelines, and any future conversations about group culture.

Introduction

WHY CREATING CORE VALUES STATEMENTS CAN BE HELPFUL

Identifying shared core values is a valuable first exercise to undertake with community members or colleagues as a precursor to discussing code of conduct creation or enforcement – or other issues of organizational or community culture change.

One clear problem with identifying core values is that choosing only aspirational words, without a clear definition of what the word means, can lead to confusion - especially when we pick common value words such as “respect”, “inclusion”, or “kindness”. Furthermore, without examples of the behaviors that do and don’t support the values, we can be unprepared to address inappropriate behavior or to trouble-shoot why we might be falling short in reaching our values together e.g. because there are training needs, structural issues or political roadblocks to doing so within our existing culture.

This exercise to create core value statements can support conversations that go deeper – and that result in more nuanced discussions of whom and what we prioritize in our group work together.

WHAT IS A CORE VALUE STATEMENT?

A core value statement consists of the overarching value word or short phrase, a 2 - 3 sentence definition of the value, and examples of positive behaviors that exemplify the value in action. Of importance, we start with the behaviors and work back to the value and its definition - which can lead to less clichéd, more precise definitions of what really matters in our shared context.

This activity was used to co-create CSCCE’s own core values which you can view [here](#).

WHO CAN DO THIS ACTIVITY?

This activity to create core value statements can be carried out with colleagues on the same team or project, or as part of a working group that includes community members – for example as part of a larger project to articulate a community code of conduct. We recommend that you limit the number of participants to less than 15, if you can. With a larger group you will need to allow more time for discussion or break the exercise into several sessions.

FACILITATION INFORMATION

We typically recommend having one person whose sole role is to act as the facilitator of the conversations (and who doesn't participate in the activity itself). If you are hosting the activity online, it is helpful to have a technical facilitator, who creates and monitors breakout rooms, as well as any questions arising in the chat or collaborative notes document.

We have provided instructions for carrying out the activity online or in-person.

Activity

IN-PERSON VERSION

You will need:

- Regular square sticky notes
- Medium-sized sticky notes or small pieces of paper and tape
- Large sticky notes (or a wall you can use for clustering smaller notes on)
- Pens

ONLINE VERSION

You will need:

- A scaffolded Google doc or other collaborative document for note-taking (view a template [here](#))
- Set up an online voting tool e.g. [padlet](#) to gather examples

Instructions

STEP ONE

Ask each group member to write out specific examples of behaviors that they believe exemplify healthy collaboration within the organization, one behavior per sticky note. It's important that these behaviors are as specific as possible.

STEP ONE

Ask each group member to submit individual examples of behaviors that they believe exemplify the operations of the organization using padlet (or whichever tool you decided to use). Copy and paste these into the shared collaborative document

E.g., *“We turn up to meetings on time and meetings end. If we’re running late, we send a message to the meeting presenter to let them know”*

E.g., *“Wherever possible, when we organize in-person conferences, we use biodegradable materials for the catering and recycle name badges and other consumables.”*

STEP TWO

In pairs or small groups, compare example behaviors and cluster similar behaviors together, either on a wall or on a series of large sticky notes.

STEP TWO

Create breakout rooms of no more than 5 people per room. Compare the example behaviors from step one and cluster similar behaviors together.

E.g., You might decide that:

“We turn up to meetings on time and meetings end. If we’re running late, we send a message to the meeting presenter to let them know”

AND

“Wherever possible, when we organize in-person conferences, we use biodegradable materials for the catering and recycle name badges and other consumables.”

cluster together.

STEP THREE

Choose a word or short phrase that describes the value that the behaviors illustrate and write it at the top of the large sticky note.

STEP THREE

While in the breakout rooms, choose a word or short phrase that describes the value that the behaviors illustrate. Return to the main room for a short report out.

E.g., in the above example you might decide that the value is: *“Respect for resources”*

STEP FOUR

Write a 2 – 3 sentence definition of the value word or keywords identified on a medium-sized sticky note and add it to the large sticky note.

STEP FOUR

Create new breakout rooms of no more than 5 people per room. Write a 2 – 3 sentence definition of the value word or keywords identified in step 3.

E.g., in the above example you might decide that the definition of “Respect for resources” is “We show respect for resources in our organization - including time, money and the planet. We strive to minimize waste and to work in ways that are sustainable - of ourselves and our environment.”

STEP FIVE

Combine the value word/keywords and examples together to create a core value statement for each value.

STEP FIVE

While in this second breakout session, combine the value word/keywords and examples together in order to create a core value statement for each value.

Respect for resources

We show respect for resources in our organization - including time, money, and the planet. We strive to minimize waste and to work in ways that are sustainable - of ourselves and our environment.

Example behaviors:

- We turn up to meetings on time and meetings end on time. If we’re running late, we send a message to the meeting presenter to let them know
- Wherever possible, when we organize in-person conferences, we use biodegradable materials for the catering and recycle name badges and other consumables.

What next? Further activities

Congratulations - now that you've identified your core values, you may want to do several additional things:

- Circulate a draft of the values and definitions to your wider community members and ask for comments.
- Host a community call where you invite discussion of the values and refine a suite of example behaviors to publish alongside them.
- Share the values on your website or community forum and display them at the beginning of meetings and events.

[CSCCE provides training](#) - including facilitation of this activity. We can also provide training in:

- How to use your core values to trouble-shoot reasons why you may be failing to meet them in your organization or community.
- How to use core values to create a code of conduct or community participation guidelines.

Citing and reusing this guide

CITATION AND REUSE

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