

Values Inventory Worksheet

Before we dive into a reflection on your organization's values, let's establish a definition of what we mean by values. Here's our definition of core values:

Core values are the fundamental beliefs of a person or organization, they:

- help people to know what is right from wrong;
- create an unwavering and unchanging guide.

Step 1:

- Does your organization have written core values?
- Do the organizations with whom you are collaborating with have stated organizational core values?

If no, skip to Step 2.

If yes, reflect on how these values will influence how you show up as a collaborative partner.

Step 2:

If you do not have stated organizational core values, you can start by reflecting on the questions below.

If you completed Step 1 above, these questions will provide additional opportunity for reflection

What are your organization's values, beliefs and norms around:

- Leadership and hierarchy
- Financial management
- Time
- Strategic planning and prioritization
- Diversity equity and inclusion
- Engagement of people receiving services
- Staff engagement
- Community engagement

Step 3:

Have a meeting where each collaborative partner brings either their stated core values and/or their reflections on the questions in Step 2 and talks about how these values, beliefs and norms guide their work. After each partner has shared, spend time discussing the following questions:

- Where are their shared values that we can build upon?
- Where are their differences we may need to address?

Be sure to document this discussion and keep a record of what was shared by each partner about their values.

Step 4:

When reviewing the health of your collaboration, or when conflict arises, go back to your notes from the Values Inventory conversation and reflect on how values may be contributing to the current situation.

Keep in mind that at times conflict can arise not from a difference in values, but a difference in how those values are prioritized. Engaging in conversation around values can help create a more cohesive collaborative group.