



**Part
1A**

Creating a Statement of Community Values

Acknowledgements

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Overview

This set of documents provides guidance for local leaders to build their own statement of values.

Along with mission and vision statements, community values are the foundation for your group. Mission and vision are **what** you do; values are the reason for your mission in the first place (**why** you exist).

Mission and vision often get crafted first. Founders begin with an idea of what they want to do, and it's a big task to get that overview mapped out. But once a clear vision for the group or event has been written, it is worth taking a step back to articulate the underlying values which the mission and vision reflect. Mission, vision, and values are the justification for your decisions and they drive your policies and procedures—**how** you do what you do.

Note: CDSS has a number of additional resources related to **mission and vision**. Visit cdss.org/portal. Especially use the filters “organizers” and “starting up.”

The intent of this guide is to save local leaders the work of finding and sifting through dozens of sample documents from other communities, searching for language that describes their values. We have attempted to do that work for you. If you copy and paste the sample language directly, we encourage you to cite the original source. Or, feel free to use the given examples as a starting point and adapt it further as you create your own values statement.

Processes for developing a values statement

1. Possible models of governance and decision-making

Before beginning to craft a statement of values, it is important to identify the model of governance your organization uses, i.e., who will be creating the guiding documents of values, mission, and vision? This will help you move forward in choosing a process for establishing the values that will guide all your other policies. Being intentional about this is actually a big part of the process of documenting your values.

To aid in this choice, please refer to the next document in [Part 1B of the toolkit, Possible models of governance or decision-making](#).

Before beginning to work on your values statement, discuss the process you will use. This document presents our suggested process, though you may choose to adapt it. Make sure that everyone with decision-making authority has reviewed the process, has had the opportunity to suggest changes, and agrees to it. That sets the stage for buy-in when the process is used to reach decisions.

2. Brainstorm

Whichever model of decision-making you've chosen, gather those people together to brainstorm the values you believe underlie your mission and vision, and which guide the behavior you hope for at your events. It is important that all the individuals included in the chosen governance model are included (or at least, invited) to participate in this process. If anyone who will ultimately have approval authority is excluded from the process, they may not feel invested in the final statement and may derail final approval.

Remember that in brainstorming, no judgment should be expressed regarding any suggested ideas. All ideas should be documented. This might be a list on a flip chart during an in-person meeting, or a shared online document if meeting remotely, or a jamboard, or other online tools for gathering and organizing ideas.

3. Categorize and synthesize

Group similar values together and look for duplication, or nuances of a larger idea. Create “umbrella” categories or statements that summarize a group of similar ideas, or create a bulleted list, with nuances of a big idea indented underneath it. Try to eliminate repetition, but make sure the winnowing process follows your agreed-upon process for decision-making. (If you nix someone's idea without their agreement, it may create bad feelings that can derail final approval of the values statement).

4. Discuss and approve or set aside

For each item in the list, discuss the pros and cons of including it as a guiding value for your organization. Some things to consider:

- a. Is the item truly a value or is it a behavior? Values describe principles and priorities. They are conceptual in nature. They describe your purpose—**why** you have your mission and vision. Behavior **reflects** values, but behavior is not the value itself.
- b. Is the proposed value over-arching, applicable to the whole organization, or narrow and specific to a subset of goals, events, or people? For example, some organizations have values that guide everyone's behavior, and additional values that guide board member conduct and decision-making. Organize your ideas accordingly. If an idea seems particularly narrow, it might be set aside, or included elsewhere as a suggestion for participants, but not included as a core value.

As you discuss each item, use the agreed-upon process for deciding whether or not to keep it. This process is very important for final buy-in from all decision-makers.

5. Fine-tune and finalize

Once you have evaluated all the proposed ideas and identified the values you all agree on, try to make them as clear, direct, and succinct as possible. Consider taking a break from the list and returning to it in a few days, or at the next regular meeting, to fine-tune it with fresh energy. Decide the format you want for the final statement or document: a narrative in paragraph format, a bulleted list with an introductory statement, or something else.

At each step of this process, use your agreed-upon decision-making protocol to get approval before moving to the next step. In this way, approval of the statement should be smooth, with no surprises. Even so, be intentional in securing final approval for the document, whether by consensus, majority vote, or whatever you agreed upon at the beginning.

6. Publish and promote your organizational values

The values statement justifies the mission and vision, and guides the behavior of participants at your events or members of your organization. Make them readily available. Publish them on your website, with an easy-to-find link on the landing page. Have hard copies on display at events. Review them at the start of every meeting, and refer to them as business is being conducted. Whenever a new decision needs to be made, consider whether or not the choice aligns with your stated values.

General observations about values statements and tips for organizers

To reiterate:

- **What we do** = mission and vision statements
- **Why we do it** = values statement
 - values about the activity (for example, we value fun, friendship, tradition, creativity, etc.)
 - and**
 - meta-values about society (for example, we value equity, inclusiveness, acceptance, etc.)
- **How we do it** = code of conduct, courtesy & etiquette, and complaint procedures, based on the stated values.
- **Who decides** = model of governance and decision-making

The way these fit together is well summarized in this set of tips from [Why Organizational Values Are So Awesome](#):

- **Distill values into observable behavior:** Don't be wishy-washy or esoteric with your values. Spell them out in human-being language, with behaviors that are easy to understand and carry out. Respect, for example, can mean so many different things to so many different people. "We respect everyone" doesn't mean anything unless you spell out specific behaviors.
- **Don't make it too complicated:** To me, respect may be best demonstrated by people washing their dishes instead of leaving them in the sink. Integrity may just mean you do [what] you say you're going to do and admit when you make mistakes. Don't complicate things.
- **Keep it visible and in everyone's mind:** Once you have your list of values, print it out, put it up on walls, have handouts for every event.
- **Use it for everything:** Your values are completely useless if they are only a list on your website. Find a way to integrate them into everything. Actually, find a way to base everything on them.
- **Discuss and adapt:** Your core values may not change often, but I find that specific behaviors under each value may change. That's OK. In fact, it's perfectly normal and even good for the organization to constantly evaluate behaviors and change them as appropriate. As new team members and leaders come along, values may sometimes change to incorporate their perspectives. This helps with ownership, which is very important. However, your board and staff may want to figure out which values/behaviors are non-negotiable.

Resources:

<https://nonprofitaf.com/2016/05/why-organizational-values-are-so-awesome-and-sexy/>

<https://www.indeed.com/career-advice/career-development/how-to-write-value-statement>