

# Leveraging Values to Strengthen Your Organization

## Rebekah Lambert, Senior Vice President

Mission, vision, and values form the central core of a nonprofit organization's strategic direction, articulating its purpose, destination, and guiding principles. These critical organizational building blocks answer the questions: What does our organization do, who do we serve, and how? What do we ultimately want to accomplish? And, what do we stand for? In this edition of *Arts Insights*, we will focus on the significance of this last question, on values, the cohesive force that binds arts and culture organizations and their stakeholders together.

### Values Defined

Values are “the fundamental beliefs or philosophies that guide the action of an organization's leaders....”<sup>1</sup> Values are an arts and culture organization's credo, the shared principles that define its organizational culture, how it interacts with its stakeholders, and how it makes decisions from the selection and prioritization of long-term strategies to daily operational and tactical choices.

Values are:

- Core to the culture, behavior, and decision-making of the organization;
- Held by many organizational stakeholders throughout the organization over time;
- Sufficiently defined and articulated to be relevant and useable; and
- Visible and recognizable throughout the organization, including through the actions and commitment of both board and executive leaders.

### Why Values Matter

#### Values Are Articulated by Visionary Organizations

In *Built to Last: Successful Habits of Visionary Companies*, Jim Collins and Jerry Porras wrote that a key step in building a visionary company is to articulate a core ideology with a “few core values” that are “simple, clear, straightforward, and powerful.” Collins and Porras identified that visionary companies place “great emphasis on having a core ideology...as a vital shaping force.”<sup>2</sup>

#### Values Help Find and Retain “Best Fit” Volunteers and Staff Members

A 2013 article in *Forbes* argued that values are important to the long-term growth of an organization in hiring and holding employees accountable.<sup>3</sup> For nonprofit arts and culture organizations, values are an effective lens through which not only to hire and evaluate staff members but also to identify board members and volunteers who will be a good fit with the organization's culture. In this regard, keep in mind that leaders need to be in alignment with your organization's long-lasting values, not the reverse.

#### Values Engage People in Your Organization

In their study of high-impact nonprofits, *Forces for Good: The Six Practices of High-Impact Nonprofits*, Leslie Crutchfield and Heather McLeod Grant found that high-impact nonprofits “start by communicating [their] values, building a strong culture, and creating emotional ‘hooks’ to engage and inspire others around [the organization's]

<sup>1</sup> Randall Rollinson and Earl Young, *Strategy in the 21<sup>st</sup> Century: A Practical Strategic Management Process*, (LookingGlass Publishing, 2010), 159.

<sup>2</sup> Jim Collins and Jerry Porras, *Built to Last: Successful Habits of Visionary Companies*, (Harper's Business, 1994), 72-74.

<sup>3</sup> *Forbes*, “Three Reasons Why Values Matter, And I'm Not Talking the Money Kind,” <http://www.forbes.com/sites/garypeterson/2013/08/14/three-reasons-why-values-matter-and-im-not-talking-the-money-kind/> (January 20, 2016).

values.” Crutchfield and McLeod Grant put values at the center of what they call the “Rules of Engagement” for building “deep and lasting relationships” with people.<sup>4</sup>

### Values Are a Filter For the Selection of Long-Term Organizational Strategies

Values are “the foundation of strategic direction, providing stability to the selection process of core [organizational] strategies.”<sup>5</sup> Keeping values at the forefront of strategic planning ensures that strategy selection is in alignment with the organization’s highest ideals.

### Values That Align and Show Impact

The strongest values statements are genuinely authentic and reflective of a distinct arts and culture organization. As Collins and Porras wrote in *Built to Last*, an organization gets at this by “looking inside,” not by “mimicking the values of other companies – even highly visionary companies.”<sup>6</sup> Values are individualized, specific to an organization in a certain community, as illustrated by the following three examples.

- During the process of strategic planning, a survey of audience members of a performing arts organization with a decades-long history of outdoor summer programming confirmed, along with other findings, that it was beloved for the casual festival atmosphere where parents could enjoy a picnic and an easy-going yet high quality cultural event while kids could play on the grass. This organization reaffirmed “fun” as a core value, which, in turn, led to an organizational priority to enhance its outdoor facility to maintain the positive audience experience.
- An arts organization that had been welcomed by its neighborhood into a historic building and supported by that same community through challenges in keeping the building is now guided by the value of “belonging.” This organization works to ensure that its neighbors are welcome and prioritizes initiatives that build engagement and authentic relationships with its community.
- “Collaborative” is an articulated value for an arts funder with multiple partner agencies and funded organizations across a diverse metropolitan area. Through its strategic planning process and discussions with multiple internal and external stakeholders, this organization rearticulated its belief that long-term success individually as well as for the cultural community as a whole require joint effort.

### Values Are Not Easy

Identifying and then living up to core values are not easy. A *Harvard Business Review* article described it this way:

“Values can set a company apart from the competition by clarifying its identity and serving as a rallying point for employees. But coming up with strong values—and sticking to them—requires real guts. Indeed, an organization considering a values initiative must first come to terms with the fact that, when properly practiced, values inflict pain.... They limit an organization’s strategic and operational freedom and constrain the behavior of its people.... And they demand constant vigilance.”

For nonprofit arts and culture organizations, values need to be more than a list in the strategic plan or on the website. They need to be embedded into the organization’s culture, personnel policies, board development efforts, community outreach initiatives, and programming decisions. Values – together with mission and vision – are the filter and evaluation tools for critical organizational decisions – what program opportunities to say “yes” or “no” to, who the best fit for a key leadership position is, and how to allocate limited resources to move the organization forward.

### Articulating Your Organization’s Values

Whether clearly articulated or not, organizational values emerge. They are reflected on your organization’s website, in your last donor appeal letter, and in the faces and voices of the volunteers that greet audience members in the lobby of your concert hall and the docents that guide student groups through your museum. Values are illustrated through your community partnerships (or lack thereof), your choice of programming, and the decision-making processes in your boardroom.

<sup>4</sup> Leslie Crutchfield and Heather McLeod Grant, *Forces for Good: The Six Practices of High-Impact Nonprofits*, (Jossey Bass, 2008), 102, 87.

<sup>5</sup> Randall Rollinson and Earl Young, *Strategy in the 21<sup>st</sup> Century: A Practical Strategic Management Process*, (LookingGlass Publishing, 2010), 161.

<sup>6</sup> Jim Collins and Jerry Porras, *Built to Last: Successful Habits of Visionary Companies*, (Harper’s Business, 1994), 74, 220.

An organization can begin the process of articulation or re-articulation of organizational values through a values review by a group of organizational leaders, representing board, staff, artists, volunteers, and other stakeholders, as appropriate for your organization. Such a process is often associated with a strategic planning process and done in conjunction with a re-examination of mission and vision as well. Through a series of facilitated discussions, the shared beliefs that are most deeply resonant will emerge or be re-affirmed. These can then be crafted into powerful values statements to help guide your organization's strategic direction into the future.

If your arts and culture organization has a values statement, good for you! Might this be the time for re-assessment or renewal? If your organization does not, better get cracking.



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Ms. Lambert joined ACG in 2009 with more than 19 years of experience in performing arts management, planning, board development, artistic administration, operations, and program planning. Throughout her career, she has proven to be a thoughtful, creative, and flexible leader. Prior to joining ACG, Ms. Lambert held positions at the Los Angeles Philharmonic, the Young Musicians Foundation, the Honolulu Symphony Orchestra, and Symphony of Southeast Texas. From 1996 to 2003, Ms. Lambert served as Executive Director of the Eugene Symphony. During her tenure, the orchestra experienced unprecedented stability and artistic growth. Ms. Lambert also served on the board of directors of the League of American Orchestras and as faculty of the Orchestra Leadership Academy. She holds a bachelor of music degree from the University of California, Santa Barbara, master of business administration from the Yale School of Organization and Management, and strategic management certificate from The George

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**Contact ACG for more information on how we can help your organization articulate its mission, vision, values, and strategic direction.**

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