Values into Action:
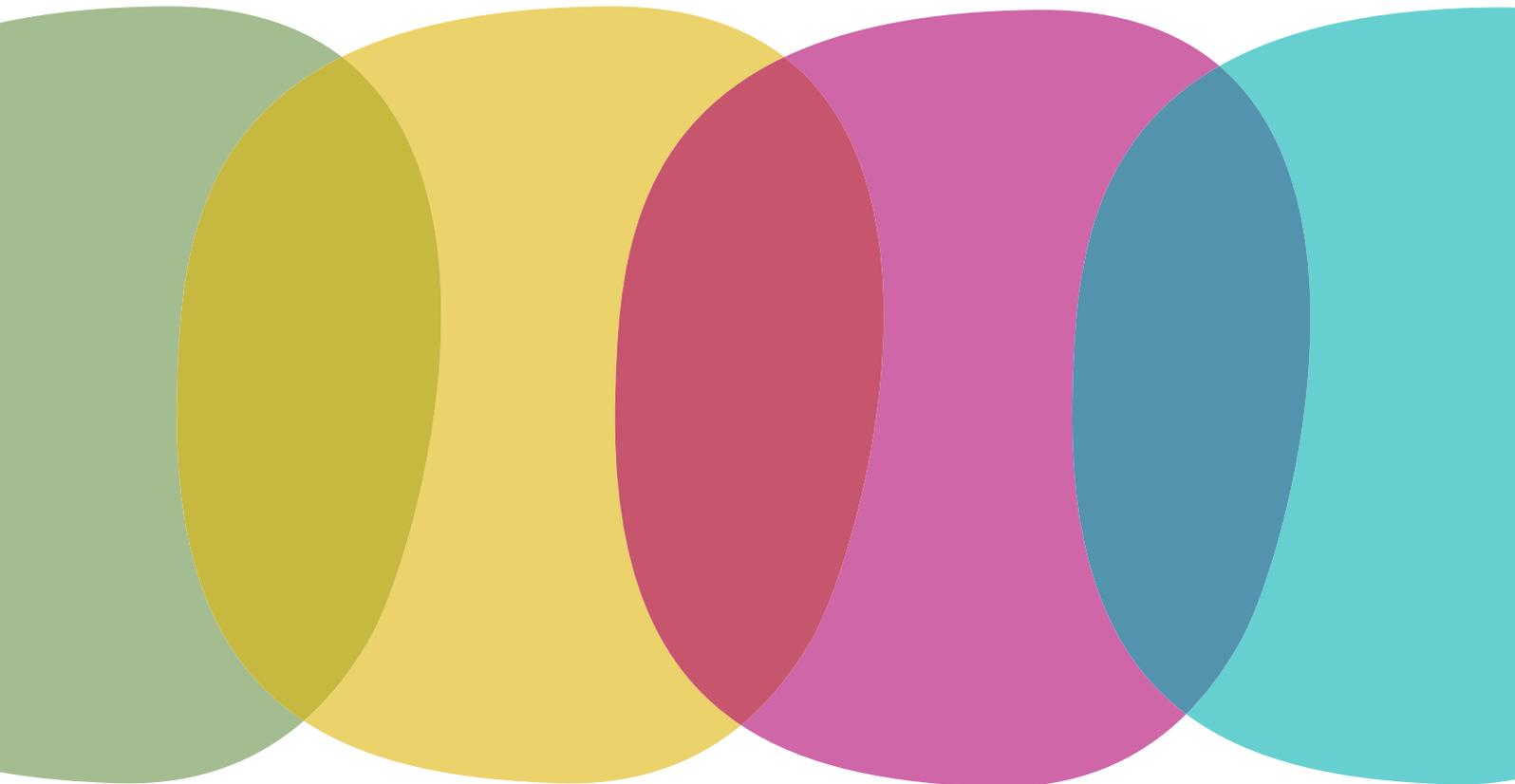
how organisations translate their values into practice

Véronique Jochum and Belinda Pratten

Introduction

Values feature prominently in discussions about the role of the voluntary and community sector. Values are variously described as both a defining feature of the sector and as a central driving force for individual organisations. They are described as a unifying force that stretches across an otherwise diverse sector, making it more than simply 'a cacophony of voices seeking a better deal for a myriad of different causes'[2]. Certainly the belief that there is a common cause or shared values connecting voluntary and community organisations was one of the strongest findings to emerge from NCVO's strategic review in 2005[3].

Whilst this belief in values as a unifying force is clearly widespread, it is rather less clear in practice whether such values are commonly held . Furthermore, there is little evidence about the value of values in the work of individual organisations, a question arguably brought into sharper focus by the current economic climate. Community Links' *Inquiry into the Values of the Third Sector*[1] has, however, begun to address these questions. The Inquiry highlighted the extent to which values shape organisations and their activities and in doing so raised important issues for a sector that is sometimes accused of losing its distinctiveness.

This report – developed in partnership with Community Links – builds on the findings of the Inquiry by looking in more detail at how organisations put their values into practice. Although this work was conceived before the recession, it is arguably more important than ever to understand how organisations maintain their values at a time when pressures to focus on delivery and efficiency are likely to be stronger than ever.

The report begins by summarising some of the current debates about values. Such discussions are wide ranging, frequently contested and rarely settled: nevertheless, a number of core themes emerge that are important for those who remain concerned about the role and future of the voluntary and community sector. These themes informed our research, which centred on a series of case studies of voluntary and community organisations who have actively sought to put their values into action.

The main part of this report summarises our learning from those case studies and concludes by offering pointers for organisations interested in putting their values into practice. What is clear from our case studies is that values are put into practice in very different ways in different organisations. Whether implicit or explicit, accepted or contested, different approaches work for different organisations. Therefore, the final part of the report offers individual case studies to enable readers to identify different approaches to putting values into practice.

[1] G Blake and M Smerdon, 2006, *Living Values*. Community Links
[2] M Sime, 2005, *'Small State Big Society?'* in View Issue 4 Winter 2005/6 pp 6-8
[3] A Blackmore, 2005, *Your Future: the consultation findings*. NCVO
[4] Third Sector Network, 2006, *Statement of Values and Principles* www.ncvo-vol.org.uk/thirdsectornetwork

Values, a defining feature of the sector?

Voluntary and community organisations are a vital part of civil society, they exist because people have come together to achieve a particular purpose, independently of the state and the market. Whilst each organisation pursues its own mission or purpose, they have a shared interest in making a positive difference to their lives, the lives of others or society in general. Therefore although the sector itself is intentionally diverse, reflecting the different interests, concerns and passions of individuals, it is said to be united by a commitment to common values and a belief in collective action.

Identifying these shared values, however, is more complex. A number of recurring themes appear in discussions about the sector's values. These highlight the importance of independent, voluntary action that is committed to:

- social justice and making a positive difference to people's lives;
- taking a holistic approach to people's needs;
- empowering people and making voices heard; and
- generating public wealth, building social capital and reinvesting financial surpluses for community need.

For some, the voluntary and community sector is 'for values' in the same way as the private sector is for profit: values are what motivate and inspire people; they inform what organisations do, how they do it and what they hope to achieve. However it is less clear whether values are a unique feature of the sector, distinguishing voluntary and community organisations from those in the public or private sector. Voluntary and community organisations do not have a monopoly on values, so what is it that makes them distinctive?

According to the Third Sector Network, it is a question of purpose and motivation: their role is to further their mission and values, rather than to maximise shareholder value or implement government policy. Therefore, 'whilst other sectors may share these values, they are not the driving force for them that they are for the third sector'[5]. For Community Links it is not so much the values themselves that make voluntary and community organisations unique, but the way they are combined in practice and reflected in all aspects of their work[6].

Value and values

It has been argued that the sector's strong value-orientation enables it to 'add value' to the services it delivers. For example, in 2005 the Government argued that third sector organisations are well-placed to deliver high quality public services because they are value-driven and 'primarily motivated by the desire to further social, environmental or cultural objectives rather than to make a profit per se'[7]. More recently Knight and Robson's work suggests that voluntary and community organisations 'have distinctive values and qualities that make them excellent providers of services and effective advocates of change'[8].

However it cannot be assumed that values create value. Generic statements of values promote an ideal model of the sector, but tell us little about how (or to what extent) values are put into practice by individual organisations. And they tell us less about the value of values. For Eliot and Piper, value refers to the full range of direct and indirect benefits that organisations bring to individuals and communities: values can help create value, but 'they are not in themselves specific benefits or achievements'[9]. As the Community Links report argues, 'If it is our values that make us special, we need to be capable of explaining and interrogating them. Are our claims actually substantiated by the work that we do and the way that we do it?'

[5] Third Sector Network, 2006, Statement of Values and Principles www.ncvo-vol.org.uk/thirdsectornetwork
[6] G Blake et al, 2006, *Living Values.* Community Links
[7] HM Treasury, Department for Trade and Industry, Home Office, 2005, *Exploring the role of the third sector in public service delivery and reform* p.7
[8] B Knight and S Robson, 2007, *The Value and Independence of the Voluntary and Community Sector.* Centris
[9] J Eliot and R Piper, 2008, *True Colours: Uncovering the full value of your organisation.* Performance Hub
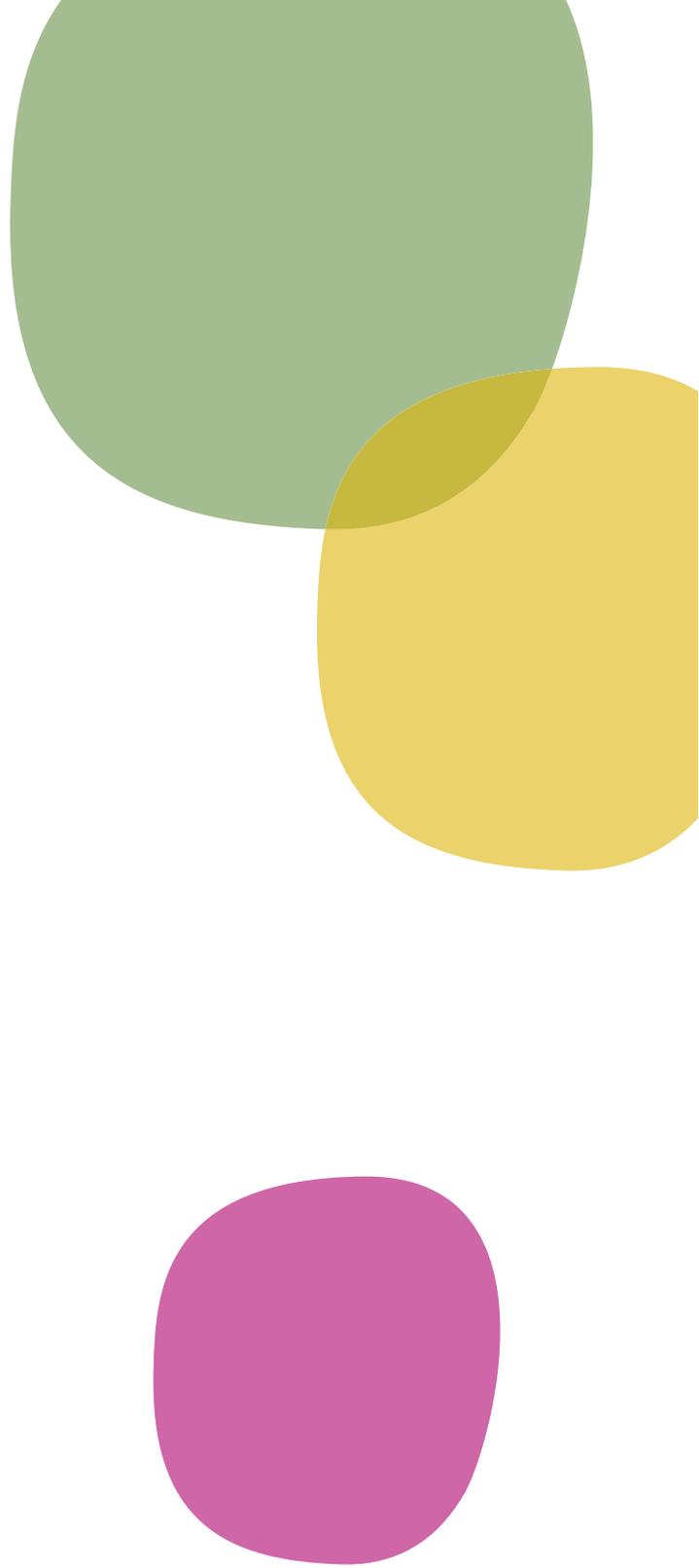
Values under threat?

A theme to emerge in the literature is that organisations with a strong value-orientation also tend to be more effective, both in terms of furthering their mission and protecting their independence. However, a number of studies have suggested that values may be threatened by external forces, particularly the need to secure funding. Recent concerns include: the 'top down' nature of the relationship between government and the third sector; overly prescriptive funding regimes; and perceived pressures to become more like business rather than simply more business-like[10].

This suggests that the question of values is a key element of current debates about the sector's independence[11]. Indeed, it can be argued that the forces that threaten values are the same as those identified as threatening independence. Therefore how organisations manage these forces, staying true to their values and retaining their independence, is an important concern for organisations at this time. For this reason a core focus of the Baring Foundation's *Strengthening the Voluntary Sector* programme was to help organisations identify practical ways of protecting and promoting their values as a means of strengthening their independence. As Matthew Smerdon of the Baring Foundation has said: 'this is about the extent to which – and the ways in which – organisations can be empowered to stay true to their most important principles'[12]. By growing and strengthening their values enables them to meet the long term needs of their beneficiaries more effectively.

[10] M Aiken, 2001, *Keeping close to your values: Lessons from a study examining how voluntary and co-operative organisations reproduce their organisations values* NCVO Research Conference Paper. http://technology.open.ac.uk/cru/publicatold.htm
[11] A Blackmore, 2004, *Standing Apart, Working Together*. NCVO
[12] M Smerdon, 2007, *Strengthening the voluntary sector: independence.* Submission to the Public Administration Select Committee on Commissioning Public services from the Third Sector

Research findings: how do voluntary and community organisations put values into action?

Introduction

Our research aimed to build on the findings of the Community Links report and explore how some of the issues, as outlined in Part I, are played out in practice. A number of key themes were drawn out from our research and these are explored in this section.

The learning in this report is primarily based upon case studies of ten voluntary and community organisations (see box), and Part III comprises short profiles of the participating organisations which summarise the main focus of the interviews.

The 10 case study organisations:

- Birmingham Voluntary Service Council (BVSC)
- FRC Group
  Gatwick Detainees Welfare Group (GDWG)
- Goodwin Development Trust
- KeyRing
- NSPCC
- Place2Be
- Quaker Social Action (QSA)
- World Development Movement (WDM)
- WRVS

What we did

This project had two main objectives, which were:

- To explore the role of values in the voluntary and community sector in shaping activity and mobilising resources, and more specifically, to examine how voluntary organisations put their values into action.
- To learn from the experience of organisations that had looked at their values very explicitly and to review the successes and the challenges that they may have encountered in doing so.

With the help of our partner Community Links, the project set out to identify voluntary and community organisations that had explored their values explicitly and reflected on how they would deliver them. Many organisations we initially looked at had values that were more implicit than explicit. Others had formalised their values in a values statement but had not done anything beyond that. As a result the organisations that took part in the research included both those which had been very explicit about their values and those with values that were deeply embedded in their activities, structures and processes.

For each organisation, two face-to-face interviews were carried out: one with the chief executive (or the person responsible for managing the organisation) and one with the chair. The focus of the interviews was not on the actual values of the organisations but more on how these values translated into practice. The interviews were explorative in nature and flexible to allow interviewees to explore in greater depth the areas important to them.

The areas explored during the interviews were:

- Communication - how oganisational values are expressed, communicated and transmitted.
- Relationships - how in practice values guide and influence the organisation's relationships with its key stakeholders.
- Strategies, decisions, and activities - how values shape and inform what an organisation decides and does.
- 'Critical incidents' - what factors may affect or have affected the organisation's values.
- Outcomes - how organisations demonstrate the impact of their values.

Key issues arising from the research

Our exploration of how voluntary and community organisations put values into practice provided a rich seam of learning which inevitably we can only summarise. Some findings are obvious, but affirming of what is considered to be good practice; others more surprising, but nevertheless useful. Nearly all are in some way practical and actionable, and as such they provide leaders with guidance on how to help their organisation live its values.

A 'value-driven organisation' is one that lives its values

These case studies reaffirmed the idea that a *'value-driven organisation'* is one where values:

- are integral to its mission, its purpose – what it is for and why it exists;
- have an important ideological role, they represent what the organisation stands for and what it aspires to be; and
- are realised in practice, in what the organisation actually does.

The interviewees often found it difficult to discuss or disentangle an organisation's values in isolation from its mission and/or vision or, indeed, from its activities:

'Being a values-based organisation means having a congruence between what we say we do and what we do, and how we do it. It's about integrity, making sure there's an integrity in the way that we talk externally about the work that we do and how we deliver the work to people.'

Values provide a common bond between diverse stakeholders

Shared values contribute to a unified organisation and provide a sense of purpose and direction which people can identify with. Many voluntary and community organisations have been established to further particular ethical beliefs about the world and a vision of how it could or should be; beliefs that continue to inform their work today. This can have considerable resonance with those who share its beliefs and aspirations. The founders of WDM, for example, held particular views about the causes of social injustice and poverty and wanted to create a movement to address these causes. That focus on injustice and social change remains vital to its mission and vision today, even as it adapts to a changing environment.

Because of this, values also create a strong bond with supporters and stakeholders, including trustees, employees, volunteers, donors and funders. People will actively support an organisation, giving it their time or money, *'because of their values, not just because they've got nothing to do on a Saturday afternoon'*. Many of those we interviewed said they got involved with their organisation because it *'affirmed and confirmed their personal beliefs and values'*. The ability to draw people in and generate those strong personal, almost emotional bonds between individuals and organisations, is a real asset for the voluntary and community sector because it is those ties that fuel motivation and commitment.

Values are expressed in what an organisation does and how it does it

Values not only help to shape what the organisation does; but how it does it; and why; they are *'fundamental to the way we do business'*. They come to life when they are realised in practice; in the approach taken; the quality of service provided; and the quality of relationships with the people the organisation works with and for:

'For us its essentially about our beneficiaries and the way that we work with people, so our values shape how we support people … the way that we encourage them to develop the lives that they want and that sort of runs through the organisation.'

Throughout these interviews the focus was on delivering the mission and vision, *'walking the talk'*; on concrete, rather than abstract concerns. Values are important because they enable organisations to further their aims and aspirations more effectively, not because of *'some fuzzy idea of doing good'*.

This focus on mission is reflected in the way that these organisations talk about their values: they are implicit in what they do, whether or not they have been expressed formally. Goodwin's values, for example, have been deeply internalised within the organisation, its culture and ethos, but have never been formalised. GDWG says that what it does implies a particular set of values, without these needing to be stated explicitly. A recurring theme here is that people outside the organisation should know what its values are, by looking at what it does and from their direct experience of it.

Exploring and articulating your values explicitly is beneficial

However, the interviews highlighted that being able to articulate and communicate your values is beneficial in a number of ways, for example by:

- Strengthening understanding of your aims and aspirations, which in turn can strengthen commitment to your mission and vision.

- Providing a benchmark for decision-making, providing justification for what you do or, as important, what you choose not to do, for instance whether to take part in a particular campaign or turn down a potentially lucrative contract.
- Making sure that people within the organisation are clear about their role in bringing values to life; this is particularly important when their attitudes and behaviour will influence the way beneficiaries, customers and others will experience the organisation.

As one interviewee said *'we articulate our values very strongly to ourselves, we demonstrate them to other people by what we do'*. If values are to be embedded in the way that the organisation works, then the onus is on those who work for it, whether paid or unpaid, to put them into practice. Values should be present in the way that they behave; how they interact with the individuals and communities they work with and for.

Internal communication about values ensures that everyone inside the organisation keeps a focus on values and what these mean in practice. For some this is more important than having an explicit statement for external stakeholders. Therefore while GDWG does not have a formal statement of values, it does have guidelines and a code of conduct for volunteers about how they should behave.

There needs to be clear and consistent internal communication around values, so that those working in the organisation know *'what to expect and what is expected of them'*. The bigger the organisation, the more important this becomes. The NSPCC, for example, talks about having a *'relentless flow of communication'* to ensure that its values are understood throughout the organisation, its branches and teams.
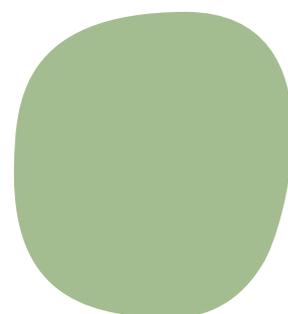
People are the vehicle of values

Values come to life and are expressed through the actions, behaviours and attitudes of the people within an organisation. People will often choose to work for a particular organisation because it resonates with their personal values. They will be highly motivated to put these values into practice and therefore more likely to stay with the organisation. However, difficulties can arise if someone does not understand or value the organisation's ethos, for example in relation to the rights of migrants or the potential of people with learning disabilities, when this is so fundamental to the way the organisation works and what it stands for.

For this reason a concern with how people are recruited, managed and supported are key issues and recurring themes in these interviews: most of the people we talked to have taken active steps to ensure that applicants understand what the organisation stands for, and what that means in practice, as part of their recruitment process; some also aim to assess the 'fit' with the person's own values and attitudes.

Having strong values can have a positive impact on recruitment and performance

The NSPCC has taken the most structured approach to this, using an externally-validated value-based interview process that tests candidates' understanding of, and their response to the organisation's values and behaviours associated with those values in the workplace. This was developed and refined in collaboration with staff, who were asked to contribute to a dialogue about the organisation's values and, crucially, how values are expressed in practice: what sort of behaviour or approach could or should be expected. It is now used across the organisation, from senior managers to frontline staff, and is also embedded in appraisals and annual performance reviews.

The FRC has taken this a step further, creating a system of rewards that recognise and celebrate staff who have excelled in putting the organisation's values into practice in their work. Its values are explicitly concerned with how it runs its business and improving the performance and professionalism of its staff. As a consequence there are particular expectations on staff to demonstrate how they have put the values into practice and to excel in doing so. This is backed up by a system that publicly rewards staff for doing so.

Values will not survive in practice if they are only top-down

It is also recognised that this is a two-way process. Getting commitment to and ownership of values from staff at all levels within the organisation was a recurring theme in many of these interviews. Not just as a means of achieving conformity, but because everyone has a role to play in bringing values to life, from the receptionist on the front desk to the chief executive; their input should be encouraged and valued. As one interviewee said, *'how we support our volunteers, how we support our staff ... everyone has to feel empowered, in control of their work, able to explore new ideas and take them forward'*.

For this reason a number of these organisations had put in place mechanisms to enable employees and volunteers and/or members to contribute their ideas as well as providing on-going support to help them deliver the organisation's mission and values in practice. For example, creating opportunities for staff to meet regularly and share their knowledge and experience, as well as through formal induction and training programmes. These different processes as well as the way the organisation is structured strengthen buy-in and encourage the cascading of values across the organisation.

Values need to be periodically discussed and debated

Interviewees also highlighted the importance of talking about values as a way of keeping them alive in a changing world and ensuring that they are widely shared and understood. One person described this as *'keeping your history alive, by that I mean also the values; keeping it relevant, revisioning it and rebuilding it into the future'*.

However, it cannot be assumed that everyone associated with the organisation knows what its values are or share the same understanding of what these mean in practice. Therefore a discussion about values can open up a much bigger debate than anticipated. This was the case for the organisations we interviewed that had recently formalised or reviewed their values. As some of these organisations found, this process can sometimes be challenging and can open up previously concealed tensions over values which have contested meanings. Ultimately they found it valuable because it created a shared understanding and ownership of values:

'Thinking about values and articulating them has helped the organisation to do things more effectively, it has challenged the organisation to do things in the best possible way.'

Values are integral to good governance

Values can connect an organisation both to its past and its future, defining what it stands for as well as what it is for. People who have been associated with an organisation for a long time, who can relate its history and act as role models for new members and supporters, help to provide this continuity. Very often this role is played by trustees or management committee members. Indeed, one organisation changed the way that its board was elected, so that only a third of places would be up for election in a given year, in order to ensure this continuity.

Trustees are the organisation's *'moral compass'*, they have a legal and moral duty to ensure that the organisation stays true to its mission and values. Therefore, *'understanding our organisation's values and ethos is part of being an effective trustee'*. They have an important strategic role, ensuring that the organisation works in ways that are consistent with its values and, looking to the future, ensuring that these values can be applied to new circumstances and situations, so that neither the values nor the organisation becomes moribund.

Trustees also have oversight of the executive and must ensure that decisions taken by paid staff are consistent with the organisation's mission, vision and values. As one interviewee said, values are *'a live thing that my board tests every month at the board meeting'*, not as a specific agenda item but as a vital and integral part of the discussion and decision-making process.

For some organisations, their values underpin the relationship between the governing body and the membership or the communities it serves. For example, KeyRing is committed to empowering and involving service users, and have set up support systems to enable them to become Board members and take a full part in decision-making. This again demonstrates that values are a means as well as an end: how decisions are made, and by whom, are as important as the outcome of those decisions. For this reason how the organisation lives its values should be integral to good governance.
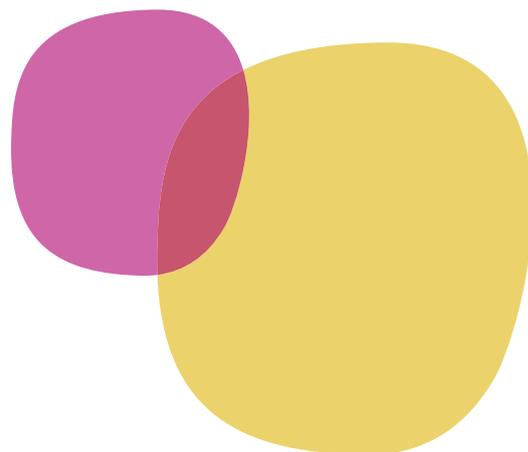
Values are a powerful management tool

The interviewees highlighted how organisational values were at the heart of the decisions they made and key to the strategic direction of their organisation. When, for instance, an organisation such as BVSC needed to restructure and redefine its strategy, exploring their values proved to be a very constructive starting point. Once the values had been articulated with a range of different stakeholders it became far easier for the organisation to focus on its strategic goals.

Values provide a sense of direction and help an organisation decide what fits with its mission and purpose, and importantly what does not. As the director of QSA told us being very specific and clear about organisational values and purpose makes decision-making easier as 'it creates an imperative for action'.

Thinking about values and articulating them challenges the organisation to deliver those values in the best possible way. This was clearly the case of the FRC Group that monitored the work of its employees against the organisation's four key values. The reward system in place ensured that the workforce adhered to the values of the organisation, which instilled a strong work ethic and led to a better service. Monitoring against values helped improve performance at both individual and organisational levels.

What the interviews highlighted was that senior managers and chairs combined the values of their organisation with managerial values such as accountability, effectiveness and performance. Understandably, this can sometimes lead to tensions, however more emphasis was placed on the advantages of bringing the two together.

Values can provide a framework to reflect and evaluate

Thinking about values in relation to performance had encouraged at the FRC Group a culture of self-improvement and self-awareness in the organisation. The work of QSA around organisational values was carried out as an internal development tool which provided a framework for the organisation to be reflective about the quality of its practice. Values can be used to check and challenge the organisation, evaluating whether it is delivering what it set out to do and whether it can have a greater impact. Values can also be used by organisations as a vehicle for change and transformation as shown in the BVSC and WRVS case studies. For example, changing attitudes towards, and expectations of older people, mean that 'a cup of tea and a game of bingo' is no longer an appropriate response to their needs and therefore organisations need to adapt and evolve to maintain their relevance.

Values are a vital touchstone for organisations facing change

A key challenge for voluntary and community organisations is the need to adapt to change without losing sight of their core values, especially in a rapidly changing policy and funding environment. The need to respond to new policy priorities; to work in partnership with others; to generate income; and the consequences of either sudden growth or rapid retrenchment can create real dilemmas that potentially compromise or undermine an organisation's values and principles. At such times, values are a vital touchstone ensuring that the organisation does not lose sight of *'what it is for and what it wants to achieve'*, even if it means making hard choices.

Interestingly, there are particular challenges associated with organisational success and growth. For example, replicating an effective model of delivery in new areas or with different service users means ensuring that new people coming in to deliver these services are aware of, understand and can deliver the organisation's values in practice. The Place2Be, for example had begun to think more explicitly about its values for this reason. But it is not all one way: KeyRing found that it needed to work with local authorities to demonstrate that they provide more effective, if also more costly services, in order to win contracts, suggesting that a value-based approach can enhance an organisation's market-position.

However, the need to balance values against long-term financial sustainability raised very real concerns for some people we spoke to. Over the last decade the challenge of managing change has been at a time of growth for the sector. In a recession it is likely that the decision to turn down a potentially lucrative contract because the terms on which it is offered compromise the organisation's values will be harder to make and will test organisations even more.

Conclusion: arguments for putting values into action

In its report on Living Values, Community Links concluded that voluntary and community organisations need to go beyond *'vague assertions'* about values and 'put values at the centre of every activity'. This research explored how ten organisations have done this in practice, in order to find out what could be learned from their experience of doing so.

To achieve this aim, it was necessary to find organisations that had explicitly reflected on their values and on the way that these values had informed their work. This proved more difficult than anticipated. Nevertheless, the ten organisations chosen draw attention to the benefits of focusing on values in action, as well as to some of the challenges that this involves.

The value of values

These case studies suggest that a strong value-orientation can be beneficial in a number of ways:

Firstly, where values are explicitly considered in relation to the beneficiary or customer, greater attention is given to the way they are treated and what they gain from their encounter with the organisation. In this way values can provide a means of checking and challenging the appropriateness and effectiveness of the services provided and can have a direct impact on performance.

Secondly, because they inform not just what you do, but how and why you do it, values can provide a valuable benchmark for decision-making, particularly at critical times. For example in deciding whether to follow a particular course of action or to accept the terms of a contract. In the absence of a profit-motive, being true to ones values can be a determining factor. For this reason it is important that values are built into organisational structures and processes and are used to inform strategic and operational decisions.

Thirdly, values can provide an important element of continuity in a changing environment. Being part of the organisation's founding story, in the sense of what it is for and what it stands for, they can also provide a touchstone for the future, helping it to adapt to new circumstances whilst staying true to its roots.

Fourthly, values can inspire and motivate donors, supporters, paid staff and volunteers, creating a strong bond with, and a high level of commitment from those who share the organisations values and aspirations. They can, for example, have a positive impact on recruitment. At the same time they also challenge organisations to ensure that people within the organisation are treated in accordance with its values.

The challenge of values

Whilst there is a strong business case to be made for living ones values, these case studies demonstrate that explicitly putting your values into practice in all that you do is not always easy. Indeed, the larger the organisations the more complex it becomes, with greater numbers of people involved and a greater range of functions to take into account.

Values are contested: it cannot be assumed that everyone within an organisation will agree on what they are, and what they mean in practice. They need to be debated, owned and shared; this is not a process that can be undertaken quickly or imposed. And debates about values can often be uncomfortable precisely because they have a personal resonance and speak to people's strongly held beliefs and principles. Nevertheless, those discussions, however difficult, are important both as a means of generating a sense of ownership and belonging and in ensuring that the values continue to be made relevant.

Those who work for an organisation, whether as paid staff or volunteers, have a particular role to play in transmitting values. They are the ones who will put them into practice at the frontline. However, this cannot be achieved through control from the top-down: values must be understood and owned by everyone if they are to be implemented in a meaningful way. For that to happen they too must be able to reflect on and, where appropriate challenge the way values are practiced if those values are to be kept alive.

Being value-driven becomes harder when times are tough. A recurring theme in many of these interviews is the extent to which the funding environment can challenge values, with greater priority being given to generating income. However, being clear about values, and the difference they make to the services you provide and the quality of life of your end users can potentially give organisations a stronger negotiating position. The real challenge is in being able to demonstrate the value of values, which again can only be tested in practice.

Living values

These case studies say less about the role of values within the voluntary and community sector than about their role in relation to individual organisations. In these conversations, the focus was on the specific values espoused by each organisation, rather than generic values associated with, or unique to the sector as a whole.

Clearly, there is no right or wrong way to put values into practice, different organisations need to decide for themselves how best to bring their values to life and ensure these maintain their relevance in a changing world. However, there is also much that can be learned from the experience of those organisations that have explicitly thought about this and have tried to put them into practice in a systematic way.

The report began by arguing that the voluntary and community sector does not have a monopoly on values. However, our experience of the case study organisations suggests that by living their values voluntary and community organisations can strongly differentiate themselves from the private and public sectors, and in doing so maintain a distinctiveness that is likely to be increasingly important in difficult times.
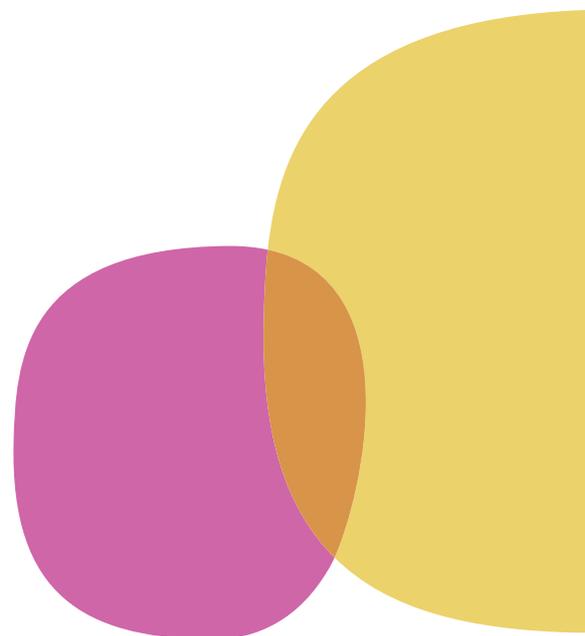
Part III

Organisational profiles

The final part of the report comprises short profiles of the participating organisations which summarise the main focus of the interviews and illustrate different approaches to putting values into practice.

- Birmingham Voluntary Service Council (BVSC): Values provide focus and direction
- FRC Group: Values are rewarded
- Gatwick Detainees Welfare Group (GDWG): Values motivate and inspire
- Goodwin Development Trust: Values and managing growth
- KeyRing: Values and model of delivery work hand-in-hand
- NSPCC: Values-based interviewing helps recruit the right people
- Place2Be: Values emerge from practice
- Quaker Social Action (QSA): Values need to be discussed and debated
- World Development Movement (WDM): The value of being a participatory organisation
- WRVS: Values and managing change

Birmingham Voluntary Service Council (BVSC)

Background

Founded in 1964, BVSC is the main voluntary sector infrastructure organisation in Birmingham providing information, advice and guidance to voluntary and community organisations.

BVSC's income for 2007/08 amounted to £2.8 million, generated through a combination of grants and contracts (70%) and social enterprise activity (30%). Over the last two years, the total income of the organisation fell significantly (by approximately £2 million) because of agreed changes in funding streams, particularly from statutory funders such as regional and local government bodies, and the reduction in regeneration programmes like New Deal for Communities and the Single Regeneration Budget for which BVSC acted as the accountable body.

Espoused values

BVSC values are expressed in a number of beliefs:

- 'Voluntary action as a positive force for social change, contributing to cohesive, diverse and sustainable communities;
- Equity and social justice, and in tackling inequality, discrimination, and poverty;
- Birmingham's diversity as its key strength, and in all communities having a voice and access to excellent opportunities and services;
- Effective consultation, collaboration and partnership across all sectors to achieve mutual goals, thus improving the quality of life for local people;
- Challenge, risk-taking and innovation;
- Working towards providing ethical and environmentally friendly resources and services.'

Values provide focus and direction

In response to an anticipated drop in resources, the organisation chose to downsize and rethink its strategy. The organisation set out to produce a new strategic plan by exploring the organisation's vision, values and mission. Until then, the values of the organisation had been articulated, but not consistently understood by stakeholders. In addition, because of the recent proliferation of infrastructure bodies in the voluntary and community sector, stakeholders were sometimes unsure of what the organisation specifically offered. BVSC used a consultative process to do so, involving employees and board members as well as affiliates and a range of other stakeholders. The approach taken by BVSC was to ask people to reflect on why they were involved with the organisation. The process brought people together and highlighted the common ground they shared. It allowed them to express their beliefs in a strong and vibrant voluntary and community sector, to explore how this might be achieved and identify what the organisation should aspire to. A consensus was reached about the organisation's core aims, which are underpinned by shared beliefs and values. The process has given the organisation considerably more focus, reducing its 12 previous strategic goals into only four

in the new strategic plan. Before the restructuring, the organisation had many projects and initiatives, and it was at times difficult to see the link between them. The organisation had up until then operated quite organically, getting funding where it was available. At times, this distracted the organisation from its mission and goals. Now, funding is only accepted if there is a clear link between a proposed project and what the organisation wants to achieve. Having the strategic plan has enabled the organisation to make these sorts of decisions more confidently. It has also been a good tool for addressing the challenges faced by the organisation.

Values are the underpinning of the plan but the emphasis for the organisation has been on the strategic goals, partly because values are thought to be more personal and more open to interpretation. Putting the plan together has been a pivotal exercise. Each team now has a self-generated purpose statement which articulates the way they contribute to the strategic plan. There is also a direct connection between the organisation's appraisal and supervision system and both the organisation's business and strategic plans. Before the strategic plan was in place, employees were less likely to have a unified

understanding of the organisation and its purpose. Now there is far more consistency and this has been particularly important when communicating to external stakeholders. Feedback from external stakeholders has indicated a clear improvement in their understanding of BVSC's work. The strategic plan provides the common ground on which to meet.

'Organisational confidence has grown considerably as a result of our work to clarify BVSC's values. Decisions are easier to make, we're less at risk of mission drift, and there's a noticeably increased sense of unity amongst staff, trustees, and stakeholders.'

FRC Group

Background

Founded in 1988, the FRC Group is a social enterprise based in Liverpool.

The FRC Group has four major activities:

- The Furniture Resource Centre offering a one-stop furnishing service to social landlords and other housing providers.
- Revive, a high-street furniture store selling new and second-hand furniture to low-income families.
- Bulky Bob's, a collection service working on contract to Liverpool Council to collect unwanted furniture, then repaired and re-sold through Revive.
- Amovingexperience providing registered social landlords a removals service for their tenant.

In 2007/08, the group generated an income of £3.6 million and employed 79 employees. Income from the sale of goods and services accounted for 97% of total income.

Espoused values

The group has four values:

- 'Bravery – speaking up and raising issues; volunteering to help out; admitting when you need help.
- Creativity – having an idea and making it happen; suggesting news ways of doing old things; taking an interest in other companies.
- Passion - going the extra mile; being passionate about people; being enthusiastic and energetic.
- Professionalism – having great customer focus; being motivated and getting the job done; working well under pressure. '

Values are rewarded

Organisational values are present everywhere at FRC. A visitor will be made aware of these values as soon as he/she arrives in the organisation - the values are in bold colours on the walls in reception, in the literature on display and even on the badge the visitor is given on arrival. There is a very strong emphasis on communication. Having a simple, clear and consistent communication strategy around four core values has contributed to embedding these values in the organisation. It has helped create a shared identity and a culture. However, the senior management team strongly believes communication alone is not enough to see values translate into practice.

*'We've got a language, a culture, a club'*

Thinking explicitly about its values has helped FRC think about what it does and the type of services it provides, but the focus of its approach to values has been more on *'how things are done'* in the organisation. Values are defined by the organisation as 'beliefs in action' and are viewed as inseparable from what a person does and how he/she behaves at work: *'they are the way that we want everyone at FRC to work'*. Under each value, a range of actions and behaviours have been identified (e.g. Bravery: speaking up and raising issues; volunteering to help out; admitting when you need help) and are promoted throughout the organisation.

To ensure that these values are translated into practice and become reality, the organisation has put in place a values-based reward system which is used to *'recognise, reward and celebrate our employees' outstanding work and improve their performance'*. Each month team leaders are asked to nominate an employee who they believe has demonstrated all four values. The group's directors choose a winner amongst those nominated and this is announced at the Employee of the Month meeting. The organisation also has an annual values award, for which people are nominated by their colleagues. A panel of judges drawn from all departments then votes for the winners (one for each value plus an Employee of the Year who has displayed the four values the most). This reward system is a way for the organisation to provide examples of the kind of behaviour it expects from employees and to encourage it. It has now been in place a number of years and allowed the values to be internalised and reinforced. Being nominated or winning an award (gift vouchers; extra annual leave) has a strong symbolic value because people feel appreciated and recognised publicly. Awards are celebrated at staff and family events and then publicised in the organisation's newsletter and on notice boards. Peer recognition is considered particularly important to the success of the scheme and has strengthened staff buy-in and engagement.

The values and the values awards are integral to the annual appraisal system that monitors people's performance and progress. They are in effect a management tool to help people reflect about their work and to encourage and measure performance. Introducing a values-based reward system has resulted in a strong work ethic throughout the organisation.

'It can't be top-down. It is at the beginning because people don't know anything about it. But after that it's got to be top-down, bottom-up, side-to-side and it just lives in the organisation'
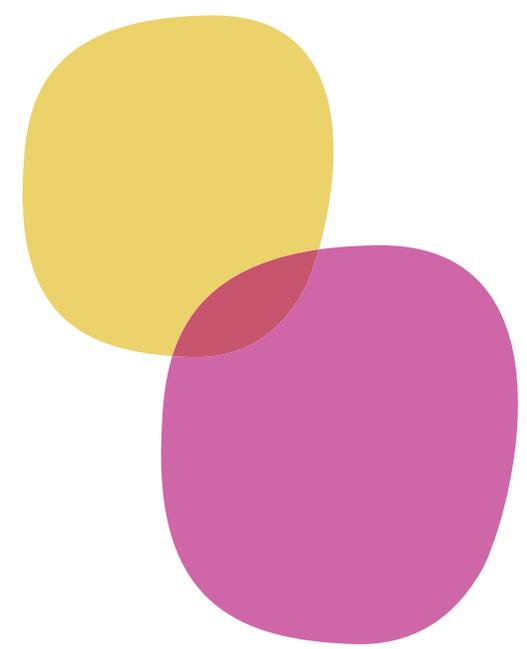
Gatwick Detainees Welfare Group (GDWG)

Background

Founded in 1995, the Gatwick Detainees Welfare Group offers a befriending service to asylum seekers and immigration detainees held in Tinsley House, the immigration detention centre at Gatwick Airport.

In 2007, the organisation assisted 563 detainees from 67 different countries. It had approximately 60 volunteers and 3 paid employees.

In the same year it generated an income of £108,851 - 80% of which came from charitable trusts and the Big Lottery Fund. Apart from a small grant from Crawley Borough Council the organisation received no statutory funding. The remaining 20% represent mostly donations.

Values motivate and inspire

Until recently GDWG was purely volunteer-led. It employed its first member of staff only a few years ago and now has a team of three. The work of the organisation is totally dependent on volunteers, who are at the centre of the visiting and befriending service it provides to asylum seekers and immigration detainees at Tinsley House. These volunteers are motivated by a common cause (i.e. improving the welfare of detainees) and a well-defined mission (i.e. providing people with support while they are detained) based on a belief in human rights and the values of respect and compassion. The commitment to these shared values is reflected in people's willingness to give up their spare time to volunteer and in their commitment to the organisation. Many have been volunteering with the organisation for a long time. Some have been volunteering since it was founded.

Espoused values

GDWG's values are expressed in the following statement:
'The group believes that each detainee has a right to be treated with respect and compassion, whatever the outcome of their case'.

A lot of care is taken to ensure that these values of respect and compassion are shared by the volunteers at the recruitment stage and that they share a concern for the welfare of migrants. Very occasionally people have not been recruited as volunteers because it was felt that they were not sufficiently open-minded and committed to equal opportunities.

'You can't come in with any prejudices'

The values are reaffirmed through a number of processes - for instance, through training including induction training before a volunteer starts, and through other support mechanisms such as regular area group meetings in which volunteers can talk about their experience. The organisation has a written code of conduct so that volunteers know what is expected of them. This is also made clear to them by the behaviour and attitudes of staff members. Long-term volunteers and trustees (who have all been visitors) have a key role in transmitting the organisation's values and practice.

Even though volunteers are highly committed to the purpose and values of the organisation, there is nevertheless a spectrum of beliefs and values amongst the volunteers, who are more or less radical politically. The organisation is clear that its focus should stay on welfare rather than campaigning, but debates do take place. The organisation's structure allows for people to be kept informed, but equally to influence the organisation. Volunteers very much consider the organisation theirs and would react if there was any decision made that they did not agree with.

'We would be shouted down very quickly'

Goodwin Development Trust

Background

Founded in 1994 by the residents of the Thornton Estate in Hull to improve the quality of life of the local community, the Goodwin Development Trust is a social enterprise that now delivers a wide range of services to people across the city around four key areas: health, social care and well-being; children and young people; enterprise, employment and training; and safer and stronger communities.

The Trust aims to sustain its activities through 'community asset based development' and the delivery of public services. It has a number of community facilities such as the Octagon, offering a council customer service centre, a primary care trust (PCT) medical centre, a nursery, offices and conferencing facilities.

In 2007/08 the organisation employed 320 employees and had a turnover of approximately £11 million and assets approaching £10 million.

Espoused values

The organisation does not explicitly communicate around values and has not produced a separate values statement. Its mission statement is underpinned by values of social justice and equal opportunity and is viewed as a statement of the organisation's values. The focus of the organisation is on the delivery of social outcomes (i.e. making a difference to people's quality of life) as well as on local governance and working in partnership.

Mission statement:

'We are a locally controlled and accountable organisation, committed to improving the Quality of Life within communities through identifying and addressing the needs of local people and by working in partnership with them and with statutory, voluntary and professional organisations.'

Values and managing growth

The values of the organisation might not be formalised as such but they have been embedded in the organisation over time through the way it has worked with and for local communities. This is partly due to the organisation's history and to how and why it was founded. It was initially set up by a group of very dynamic local residents to address community needs at a time when Hull had been particularly hard hit by the economic recession of the late eighties and early nineties. Its services were aimed at people living in the local neighbourhood where unemployment was very high and its first constitution referred directly to this geographical area.

The governance structure reflects the organisation's community focus. The members of the board of trustees are still predominantly local residents: the articles of association allow for a maximum of 11 directors to sit on their board, seven of whom have to be residents of the estate. These are known as

resident directors or trustees and are elected by people living in the area. These directors in turn can elect up to four partner directors. The board is viewed as the *'final court of arbitration'* ensuring that the organisation stays centered on its mission. It meets every month and board members chair the organisation's sub-committees in specific areas of work, which also meet once a month.

'What's always attracted me to Goodwin is it wasn't people coming in from outside saying 'Look at those poor people. What can we do for them?' Goodwin is driven by people who live here.'

Also important to the organisation's community focus and its desire to improve the quality of life of local communities has been the use of participatory research to identify needs. In 1998 and 2000 the organisation carried out two community audits with residents themselves consulting their peers and collecting the information. The Quality of Life reports that were produced as a result of these audits helped shape the organisation's agenda and its services. The organisation has from the start been ambitious and entrepreneurial. Its strategy has been to gain

long-term sustainability and reduce its reliance on grant funding. The energy and determination of the people who fought to see the original Goodwin Resource Centre open combined with those of the management team have led the organisation to grow significantly in a relatively short period of time. It now provides a range of services beyond the Thornton area and works with numerous partners including Hull City Council, SureStart and LearnDirect.

This impressive growth is not without its challenges. As the organisation developed its services across Hull and the Yorkshire and Humber region, it has had to reflect on its community dimension. The resident directors were keen to ensure that community representation was still taking place. In order to achieve this, each project has a management committee and half its members are residents of the area it is operating in. Another key challenge for the organisation has been finding people who have the time, the self-confidence and the skills to become resident directors for such a large organisation that is increasingly complex to manage.

KeyRing

Background

KeyRing was founded in 1990 in London and is now a national organisation working in over 50 local authorities in England and Wales

It provides community supported living for vulnerable people who want to live independently. The KeyRing model is based on a network model of support. Each network is made up of nine vulnerable people who live in their own homes and a volunteer who lives in the same area and provides support as and when people need it. This model enables the organisation to build layers of support between network members.

In 2008/09, KeyRing had 81 employees and 102 volunteers. The organisation's income has almost trebled in the last six years: from £1.3 million in 2002/03, it generated in 2008/09 approximately £3.8 million, nearly all of which (94%) came from local authority contracts.

Espoused values

KeyRing's values are expressed in a number of beliefs:

- 'All people are citizens with the right to live as ordinary members of their community.
- All people are individuals and everyone's unique qualities, abilities and experience are valuable assets.
- Informal support found within ordinary neighbourhoods is at least as important as services offered by specialist agencies.
- People are resourceful and have the potential for developmental growth.
- People have the right to take risks and to receive support to safely exercise this choice.'

diversity, inclusion and empowerment. They are about enabling beneficiaries (which KeyRing refers to as members) to be independent through community supported living networks, but also encouraging them to engage in the organisation.

Values and model of delivery work hand-in-hand

User involvement and community involvement are at the centre of what KeyRing does in terms of the service it provides and how it provides it. The organisation has a model of service delivery based on a belief in people's personal abilities and in mutual support. The values of the organisation focus on

Following some workshops with members a few years ago, the organisation created a Bill of Rights which sets out what members can expect from the organisation. The values of the organisation relate to its relationships with stakeholders and shape the way it works with people - members of course, but also importantly volunteers and employees. It strives to be consistent in how it treats people.

The organisation has put in place a structure and a range of mechanisms and processes to promote involvement. For instance, members can be elected to the board of trustees and sit on recruitment panels. There are also a number of spaces, such as area forums and the members' forums, in which people can contribute and discussions can take place. These spaces help keep the organisational values alive and provide participants a sense of belonging.

KeyRing has promoted the same model of delivery since it started. Because it has applied this model consistently over the years, it has been able to strengthen its position and highlight the value of its approach. Having this clear model of delivery underpinned by strong values has helped the organisation decide what it should and should not do, and to grow. The commitment to its core values has, for instance, allowed it to choose the type of contracts to tender for.

Management has been particularly committed to the organisation's values because of the link it sees between values, quality and outcomes. Having these strong values and being able to focus on what is important, has not prevented the organisation from evolving. Recently, for example, it decided, after consultation of its members, to aim its services at vulnerable adults rather than only at adults with learning disabilities, as in the past.

'We have to keep reflecting on what is the KeyRing way and challenging ourselves. We have a strong sense of our values but we should keep challenging ourselves on them.'

NSPCC

Background

Founded in 1884, the NSPCC specialises in child protection and the prevention of cruelty to children.

It lobbies the government and other policy-makers on issues relating to child welfare, and creates public campaigns for the general public to raise awareness of child protection issues. The charity also runs 180 community-based projects and the NSPCC Helpline and ChildLine.

During 2007/08, the NSPCC generated an income of £147.2 million and employed more than 2,000 people. It raised around 77% of its income from voluntary donations, gifts and legacies and less than 10% from statutory sources.

Espoused values

The core values of the NSPCC are:

- 'Courage: We communicate openly and honestly, challenging the status quo and using our independence and experience to lead change for children in all our activities.
- Respect: We respect children and seek to foster respect for them in others.
- Protect: Everything the NSPCC does is designed to protect children and young people from harm.
- Trust: We strive to be someone that children can trust. We work alongside and in cooperation with others, and wherever possible seek to forge new partnerships that can help to end cruelty to children.'

Values-based interviewing helps recruit the right people

In response to the recommendations of the Warner report[12], the NSPCC has developed value-based interviewing as a method of assessing candidates. In order to put this new approach in place a cross-functional working group was set up and tasked with helping the organisation think through its values. An organisation-wide consultation process allowed the organisation to articulate its values and then explore what made these values real. It led the organisation to think of values in terms of behaviour.

'We demonstrate them [values] by what we do'

'Your values base will tell you how to do it or certainly tell you how not to do it'

Seven generic behaviours that were thought to epitomise the NSPCC, its values and the way it operates were identified. These are: commitment to vision and purpose; striving for improvement; individual motivation and resilience; working together; stakeholder focus; planning and prioritisation; and accountability. These behaviours and the values that underpin them inform the recruitment of all staff. Values-based interviewing involves recruiting people against a competency profile of skills, experience, behaviours and values. Beyond assessing people in terms of skills and experience, this approach to interviewing assesses their behaviours and values to see whether they are aligned to those desired by the organisation. This very structured approach to recruitment has required time and money. It has taken five years to put in place and has involved research, internal pilots, evaluation and external validation and accreditation.

A similar approach is used in the organisation's appraisal system, which assesses individual performance against a number of factors including values and behaviours. The organisation is currently reviewing its pay system to reward employees on the basis of their contribution to the organisation and the practical application of the NSPCC values into the workplace.

During the consultation process there was much consistency in what people said and this allowed for greater ownership of the framework. The way the values and behaviours have then been tested and validated has increased ownership. Without the organisation's long-term commitment to getting its approach to values right and the investment this has required ownership across the organisation would have been weaker. Being thorough and systematic was very important, however what made the organisation's approach really effective was the degree to which it was developed and championed by a cross-functional working group who ensured it was consistent across the organisation.

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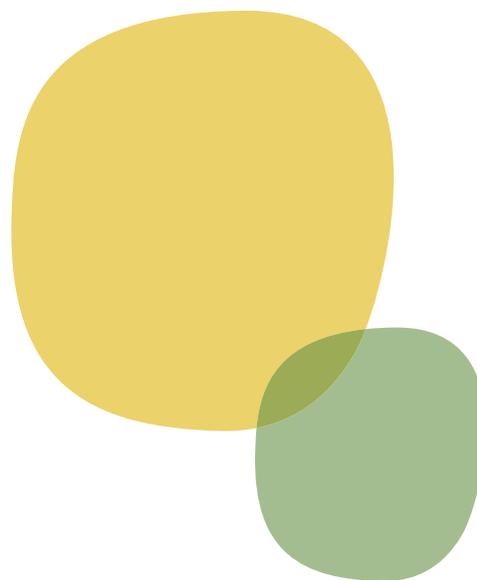
[12] Department of Health (1992) *Choosing with care: Warner report - The Report of the Committee of Inquiry into the Selection, Development and Management of Staff in Children's Homes*

Place2Be

Background

Founded in 1994, the Place2Be offers therapeutic and emotional support services to children in schools including one-to-one counselling sessions; drop-in sessions; training sessions for teachers; and support for parents and teachers.

In 2008/09 the Place2Be supported around 65,000 children in the UK with the help of 200 members of staff and 500 volunteers. It generated a total of £6.5 million. Central and local government contributed to 28% of the organisation's funding and schools to 29%.

Espoused values

The four core values of Place2Be are:

- perseverance
- integrity
- compassion
- curiosity.

Values emerge from practice

The work of the organisation focuses on a practice model, which is based on a strong commitment to the organisation's mission and to organisational effectiveness and efficiency. Backed by research and evidence of what works on the ground and makes a difference, this model has developed over a period of time. From practice has emerged a clear set of values that the organisation has only recently formalised. An earlier attempt to think about values had not been very successful, perhaps because the organisation was too young and its model still evolving, so its values were insufficiently embedded in people's minds. Five years on the results of a staff questionnaire showed that people's perceptions of the organisation's values were very similar even though the organisation had not explicitly communicated around values. This is partly due to the fact that an increasing number of people have now been involved in the organisation for longer. Many of the managers, for instance, were volunteer counsellors in the past.

Organisational structure and processes support and engage staff members and volunteers and help the transmission of organisational values. Training and induction programmes available to both employees and volunteers are key to this, as is having forums in which people can meet regularly to share knowledge and ideas. Different levels of support are built into the structure of the organisation. Every volunteer counsellor, for example, is supported by a school project manager, who is in turn supported by a local hub manager. All school managers in a particular area meet fortnightly and hub managers meet monthly at the head office as do senior managers. The structure of the organisation and the processes are adapted to its practice model and exist in order for the model to be applied consistently throughout the organisation. They are particularly important because the organisation is a national organisation that needs to provide the same quality service in all the schools it operates in.

The organisation worked with eight schools in 1999 and now works with 155. Growth has been possible because the organisation has been very clear about its objectives and approach. It has been driven by a commitment to constantly improve what it does, with a strong emphasis on learning and demonstrating the value of the services provided. The organisation has a dedicated research and evaluation team to assess the effectiveness of its interventions and recently employed a business impact analyst. Since it has grown, the organisation has found that it needs to be more explicit about its values.

'Our value has been to be very focused on becoming excellent and a model of good practice.'

Quaker Social Action (QSA)

Background

Quaker Social Action (QSA) works to tackle poverty and social exclusion in East London.

Founded in 1867 as the Bedford Institute Association, the organisation is independent of the main structure of the Religious Society of Friends (Quakers) but is governed by members of the Society.

QSA runs five major projects:

- HomeLink focusing on non-priority homeless people and enabling them to access private sector housing.
- HomeStore providing affordable furniture to low-income households.
- Street Cred supporting women on low incomes and helping them develop money-making ideas.
- Made of Money? supporting low-income families to talk, listen and learn about money and its impact on their lives.
- Knees Up empowering local residents to build safe, supportive and sociable communities where change is possible.

In 2007/08, QSA had an income of approximately £1 million. Public funding accounted for 30% of its total income; trusts (including Quaker trusts) for 46% and Quaker donations and legacies for 9%. The organisation had 26 paid employees and over 80 volunteers.

Values need to be discussed and debated

Like in any other organisation, the trustees of QSA are responsible for the governance of the organisation's projects. However, in the case of QSA they are equally responsible for ensuring that the organisation's activities fit with the Quaker ethos based on the values of peace, justice, truth, integrity and equality. The trustees are accountable for the organisation to a range of stakeholders, including the constituent group from which they are drawn - the Society of Friends.

Espoused values

The organisation has five core values:

- 'We are user-focussed – we put people at the centre of what we do. We respect and value our users and listen to what they say.
- We are creative – we work hard to be flexible and to innovate. We aim to be open and approachable at all levels of the organisation.
- We are professional – we work to provide high quality services that meet the needs of the people who use them. We strive to improve our work and to deliver services of the highest standards.
- We are accountable – we monitor all aspects of the work we do and the money we spend. We are practical and work in partnership wherever possible.
- We are inclusive – we respect the dignity, privacy and experiences of the people who use our services. We seek to be non-judgemental and to make our work accessible to under-represented groups.'

In 2006/07, the organisation carried out a strategic review and this process led the revisiting of its mission, vision and values. This was done by a cross-organisational working group, involving a number of trustees, managers and development workers. As a result of this process, a values statement (see above) was written. The five core organisational values of this statement are considered to be congruent with Quaker values - they are not identical but there is a clear overlap between the two.

Despite this congruence, there is scope for potential dilemmas based on people's different interpretation of values (organisational values as well as Quaker values). Although not frequent, internal debates around values do happen. They have taken place amongst the trustees who are not always in agreement with each other but also between the management and members of the trustee board. For instance, some of the trustees were strongly opposed to the organisation applying for Big Lottery funding because of its connection to gambling which Quakers are

against. In the end, after much debate, it was agreed that in the future the organisation would be able to apply for Big Lottery Funding. However, one of the trustees made it clear that if the organisation did receive funding from the Big Lottery he would immediately resign.

Creating a space to talk about values throughout the organisation (and not just at the management and governance level) in a more formalised way gave people the opportunity to articulate more explicitly what values are important to the organisation and what these values might look like in practice. The emphasis has been on establishing a shared understanding of what the values mean and on embedding them in practice.

To help think about values, the organisation used the Community Links publication *Living Values*[14] which provided a framework for the organisation to be reflective about its practice and for employees to be reflective about their own work. In effect, the values exercises in the publication and the conversations that they encouraged played the role of an internal development tool allowing people in the organisation to think about the services they provide, how they are delivered and how they could be improved.

'The values need to be interpreted very differently across all our projects because they're all very different. So every project manager has got to think: in what my aim is, how can I do these things, how can I live these out and how can I get better at what I'm doing?'

World Development Movement (WDM)

Background

Founded in 1970, WDM is a membership organisation that campaigns for global justice and the rights of the poor. It works with individual supporters, campaigners and an active network of local groups across the UK. It also produces a range of campaign resources to inform the public and lobby decision-makers.

In 2007, WDM campaigned on clean water provision, climate change, debt, trade and global governance. It generated over £1.2 million, two thirds of which was provided by donations from the general public. The organisation also received funding from grant-making bodies and trusts including the World Development Movement Trust, the WDM associated charity providing funds for the organisation's research and education activities. Statutory sources (European Union and the Scottish Executive) accounted for 7% of total funding.

Espoused values

WDM has not produced a written values statement. However, the values of the organisation are embedded in a statement around mission and purpose, which is part of a document that looks at the organisation strategic framework for the next 10 years (i.e. WDM Plus10). It used to have what was called a core soul statement, but it was not widely publicised amongst members nor linked into the organisation's planning process.

The value of being a participatory organisation

Over the last two years, WDM has gone through a process by which it has reconsidered its overall strategy. This strategic review has been a fairly lengthy and complex process, but it has also been a very positive and useful experience which has enhanced the links between the organisation and its members. One of the core values of the organisation is a strong belief in democracy, including for the organisation itself. The very use of the word movement in its name shows that members and supporters are at the centre of what the organisation is about and how it operates.

[14] G Blake and M Smerdon, 2006, *Living Values*. Community Links

'We are a democratic movement by institutional arrangement, but we want to be a democratic movement by instinct, a day-to-day democratic movement'

Participation and governance have certainly been a key focus of the strategic review process, which involved members and supporters at different stages. Workshops took place for local groups and focus groups were organised with a range of other supporters to discuss and debate what the organisation's strategic priorities should be for the future. The final framework was voted for at an AGM. It is viewed as the guidance document for the leadership bodies and future leaders of the organisation, including the elected council (i.e. the trustees), the management team, local group coordinators and key activists.

The process itself has been very important. Being participative and discursive has helped the organisation become more democratic. There is now a greater expectation of deliberation and debate amongst members and supporters. The organisation is currently putting together a governance strategy to further enhance internal and external democracy and the involvement of members and partners. However, getting the balance right is crucial because participation can be challenging and demanding, and tensions between participation and good management can arise.

The review process did not set out to discuss values but it inevitably did. Even though there were some disagreements during the review, it highlighted how strongly people shared the same values. The disagreements that existed did not concern the issues the organisation campaigns on. The differences of opinion were more about emphasis and timing.

People's values, whether members or employees, are strongly aligned to the organisation's values. They choose to engage with the organisation because *'they absolutely passionately believe in what [it does]'*. People may share the same values but they operate in a range of different contexts and may exhibit these values in different ways. The fact that the organisation considers itself a movement implies it is perhaps looser and more fluid than other organisations, but it still requires some common understanding. Key to this is the recognition that the organisation has a history. It is about explaining to people who engage with the organisation where it comes from; linking the past, present and future together and ensuring that they feel part of a movement and a continuum.

'We're a living movement with a history and those values have grown and developed'
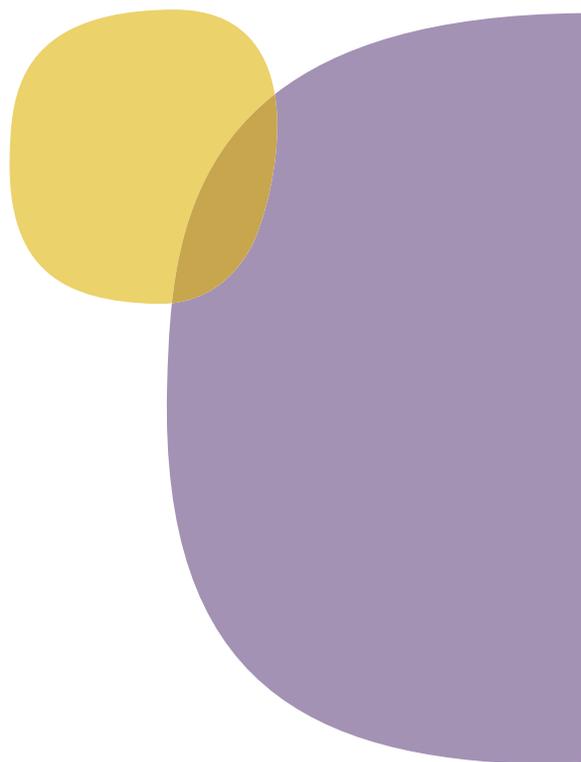
WRVS

Background

Founded in 1938 as the Women's Voluntary Service for Air Raid Precautions, WRVS now provides a range of practical services to help and support older people in their home and in the community. These include hospital services (e.g. retail and catering), food services (e.g. Meals on Wheels), community services (e.g. information centres and cafés) and emergency services (e.g. crisis support)

In 2007/08, WRVS had 55,000 volunteers and 2,500 employees. The organisation generated an income of £84.4 million. The two main income generating activities were hospital shops and cafés (£55.2 million) and food contracts with local authorities providing Meals on Wheels services (£16.3 million).

Espoused values

WRVS values are expressed in a number of beliefs:

- 'Older people deserve choices to get more out of life
- Volunteers are vital and they can get as much out of volunteering as the people they help
- All employees are entitled to understand and feel proud of the critical part they play in the success of WRVS
- We can have a greater impact through working in partnership with others
- Everyone deserves the opportunity to both contribute and feel that they belong to their community.'

Values and managing change

WRVS is currently going through a major transition phase and has in place a change management programme. This is largely due to wider changes in the funding environment of the voluntary and community sector. One of the major challenges facing the organisation is to establish sustainable funding streams to replace the core funding grant that has been withdrawn by central government. Another key challenge is the need to adapt services to changes in societal attitudes towards ageing and expectations of older people.

Faced with this changing and challenging environment, the organisation has had to revisit its purpose and its strategy. It has done this through a series of exercises exploring a range of areas including the organisation's vision and mission; stakeholder needs; and branding. These exercises have led to debates around values and helped the organisation articulate how everything fits together. There have been many discussions around the use of language and what the use of certain words might convey in terms of values; and how values should be operationalised in practice. This process is viewed as part of the organisation's *'a journey of transformation'* with changes happening over a number of years.

The need for the debates and conversations has been particularly strong because the organisation wants to address the challenges it faces and move forward while still holding onto its key strengths. One of these is undeniably the support of its many volunteers, who play a vital role in the delivery of its services.

'We've got people who are really, really committed to the organisation and to what we stand for, and of course that's the enormous strength of the organisation'

The organisation recognises that its change management programme will take time because people in the organisation, including the volunteers, need to accompany it and buy into it. It is looking to establish a volunteer engagement strategy to address how volunteers on the ground are involved and how they successfully put the organisational values into practice. Its aim is to improve people's volunteering experience but also to ensure that volunteers are delivering the organisation's agenda.

This agenda, and the values that underpin it need to filter down to the volunteer level. This is particularly challenging for the organisation because of the size of its volunteer workforce and because it is geographically dispersed. So far, the emphasis has been on communication rather than performance management. In the future it is likely that new training and development programmes will be put in place and that different types of behaviour will be acknowledged and rewarded.