

ADVISORY

THE IMPORTANCE OF CORE VALUES IN PLANNING

by Christina Drouin

Core Values. We all have them. So do organizations. What are they? What role do they play in planning? What can an organization that has done work in core values expect as a payoff?

Meaning

Core values are the defining ideals and standards to which the organization ascribes worth above and beyond all else. They are, as author Jim Collins states, “the handful of guiding principles by which an organization navigates.” (Collins, *Building Your Company’s Vision*)

Description

Core values define priorities by articulating the ideals and beliefs that this organization stands for. As such, core values are the root cause of all structures, processes, behaviors and resulting organizational culture. More than anything else, they establish the organization’s identity. Over time they lead to the development of behaviors that form group norms. They are enduring and as such are expected to have the same lifespan as the organization itself.

Purpose in a Plan

As any long-term approach to decision-making should incorporate what the organization holds dear, core values are indispensable to strategic planning. In the strategic planning process, they are cornerstones. After having been established core values inform mission, vision and goals.

On both operational basis and strategic bases, when core values are being lived into, they help to avert conflicts, build community, inform choices that shape behavior, establish priorities, and create an overall sense of well-being that comes with everyone "being on the same page."

For external constituencies the articulation of core values defines the personality of the organization, establishes expectations, and builds a solid foundation for successful relationship-building.

Attributes of Core Values

- Alignment
- Unity
- Clarity
- Harmony
- Self-awareness
- Commitment
- Enduring



Behaviors

Organizations with articulated and claimed core values:

- Know who they are and what makes them distinctive
- Are aligned in word and action; beliefs match deeds
- Share common expectations of individual and organizational behaviors
- Are clear about what is and isn't important to them
- Can identify when an individual, activity or even the organization itself is out of alignment with what it says it stands for
- Use values to inform purpose
- Use values to inform decision-making
- Seek to retain and attract individuals, groups, alliances and allegiances that share their values
- Continually seek to develop projects, programs and activities that articulate their values
- Can think and act autonomously across functional areas, and yet maintain congruency with the core identity of the organization and one another

Cautions

Once claimed and articulated individuals who do not share or are not pre-disposed to sharing values, may find it less and less comfortable to exist harmoniously in the setting. As a consequence, they may find it more comfortable to opt out and move on. This is a normal outcome of staking out core values that, while providing leadership challenges over the short term, leads to greater institutional alignment over the long term.

Values and Mission

Values and mission together form the core ideology of the organization, now and in the future, which author and planner Jim Collins has suggested is critical to preserve the core of any organization, even as it seeks to stimulate progress through envisioning a future and identifying bold goals to achieve it.

