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Towards Becoming A Values-Based Organization

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Abstract

This paper describes the journey of a mid-size community college towards developing and institutionalizing a core set of values into the culture. The aim is to establish a common guidepost to integrate planning, decision-making and behaviour within the learning community of Red Deer College (RDC). Consultative process was used to engage staff and students in defining the values and a set of associated questions for each value. In order to encourage living the values, strategies were implemented to create strong branding, to establish the values as the organizing framework for key processes, and to facilitate conscious use of the values in daily activity. The values were linked to the college vision, mandate, mission, board goals, and leadership principles as an integral component of the 'big picture' and of ongoing cultural change.

Key determinants of success and key challenges are outlined as well as future directions.

Towards Becoming a Values-Based Organization

In the summer of 2000, the President of Red Deer College initiated development of a framework for planning within a rapidly changing post secondary environment. It was his desire to align activity within the college and to engage all members of the learning community by establishing a common context for behaviour, decision-making, and planning. This resulted in the development of a set of core values for the college. Cleveland (2002) agrees that setting common norms and standards creates opportunities and incentives for people to advance the common purpose. According to Secretan (1997, 1999), there has been a renaissance of values and spirit in the workplace. This emphasis on values has been a growing trend in the leadership literature over the past ten years as evidenced in leadership terminology, such as "principle-centred leadership" (Covey, 1992), "inspirational leadership" (Secretan, 1997, 1999), "values-based leadership" (Kuczarski and Kuczarski, 1995), "connected leadership" (Drath, 2002), "authentic leadership" (Lee and King, 2001), and "primal leadership" (Goleman, McKee, & Boyatzis, 2002). The trend grows out of appreciation that today's knowledge workers

want to be active participants, to fully engage their hearts, minds, and talents in doing work that matters and contributing to the common good (Abrashoff 2002; Bennis & Thomas, 2002; Buckingham & Coffman, 1999; Izzo & Withers, 2002; Kouzes & Posner, 1999, 2002; Moxley, 2000). Values connect minds, hearts, and the collective work of the organization. In his definition of learning organizations, Senge (1990) addresses the concept of connectivity:

...organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.

Consultations were held throughout 2000-2001 to create dialogue regarding the values most important to staff and students at Red Deer College. Consultants and staff representatives summarized the input into a set of six core values: exploration, excellence, inclusiveness, accountability, integrity, and community. Guiding questions were also developed for each of the values. "These questions form the framework for how we do business, how we make decisions, how we achieve our vision, and how we ensure that we are living in concert with our deeply held values" (Woodward, 2001).

Figure 1 (PDF) illustrates the values logo and guiding questions.

Living the Values

Once the core values and guiding questions were established, continued attention was necessary to ensure that they became a living credo within the college, rather than just another document on the shelf. A number of actions were taken to increase awareness of the values and to establish their conscious use to guide planning, decision-making and behaviour in the college, and to institutionalize them as an integral influence within the culture.

Consistent, High Impact Visual Presence: Branding

The marketing department coordinated a task team with mixed representation from across the college to develop a number of graphic representations of the values. Based on staff feedback, one was chosen to be the consistent logo for the college values. The design is both vibrant and attractive with 6 feathered spokes clustered closely around a circle with learning at the centre. The overall visual creates the sense that the elements are viewed as a whole and suggests movement, flexibility, and interdependence. "We have placed learning at the heart of everything that we do" (Woodward, 2001).

Large posters of the logo and guiding questions have been posted throughout the college with particular attention to meeting rooms in order to support use of the values in planning and decision-making. A banner inside the main entrance to the college highlights the values to all visitors. Other materials featuring the values logo

include bookmarks, mouse pads, banners, and card sets. The logo is also incorporated into communications, such as e-mails, letters, articles, and other relevant documents. Values are featured on meeting agendas and meeting minutes as an additional prompt for their use in decision-making. The encouragement of use of the values in a wide variety of venues results in 'branding' and an establishment of organizational traditions. As noted by Palmer (1998), "Though the traditions vary widelyall hold out the same hope: we can escape fear's paralysis and enter a state of grace where encounters with others will not threaten us but will enrich our work and our lives (p. 57)."

In addition to internal recognition, the values logo format is featured on the college web page, as well as in community communications, such as billboards, pamphlets, recruitment materials, and newspaper advertisements.

Linking the Values to the "Big Picture"

Although the values are a key underpinning for planning, decision-making, and behaviour at the college, they do not stand alone. The college vision, mandate, mission, board ends, goals, values, and leadership principles together constitute the compass that guides our activities as a learning community. During 2002 and 2003, workshop discussions were held throughout the college to make these connections explicit and to explore how each individual and each department contribute to the 'Big Picture'.

Personalizing the Values

Over the last 2 years, several departments, including Nursing, Teaching Assistant, Science, Rehabilitation, Extension Services, and Performing Arts, further explored and detailed how they live the values within their programs. This assisted staff to personalize the values according to the unique profile and focus of their department. It connected the daily work of individuals to the mission of their department and to the overall direction of the college in a very concrete way that encourages commitment to the values.

For example, the nursing faculty developed a shared understanding of what each value looks like in their program. They produced department specific banners and bookmarks, illustrating how they live the values in nursing and they also acted this out in skits during their department retreat. "We promote excellence in the nursing program by: providing support for students' professional and personal growth; providing support for faculty members' professional and personal growth; encouraging ongoing reflective practice; and celebrating our achievements" (Nursing Program bookmark, 2002).

Individual departments continue to explore and document how the values are expressed in their program. In some departments, examining scenarios using the values as a filter has assisted staff to

see how the values prompt them to think differently about the issues presented.

Living The Values in Leadership

In 2002-2003, the Operational Leadership Team for the College engaged in dialogue to develop a shared understanding of the values and to build upon them to draft a set of leadership principles. A consultative process was then conducted to establish dialogue on the draft statements and to explore the desired characteristics of a values-based work and learning environment. The feedback and additional emergent themes were incorporated into the revised leadership principles. The first principle states that "we are guided by our values" and each principle is directly linked to the values. For example, the principle that "we use fair process in decision making, balancing consultation and timely action" (Red Deer College, 2003) is directly linked to our value of integrity.

Consistent with shared leadership as a key principle, a role was established to operationalize leadership development in the college. An appointment was made in August 2002 to the new position of Dean of Leadership Development and Learning Effectiveness. One of the key objectives of the Dean is to develop an internal Leadership Certificate Program.

The Operational Leadership Team also endorsed the establishment of a Leadership Enhancement and Development (LEAD) Advisory Team. Team members act as champions for the values and for continued positive change in the college. In 2003, the team conducted a survey to measure to what extent the desired characteristics of a values-based work and learning environment are perceived as being currently present in the culture. The task team is analyzing the data and will make recommendations for actions to support our continued evolution towards becoming a values-based organization. An 18-month post survey will be conducted to evaluate progress.

Values as the Organizing Framework

As we continue to evolve, we are establishing the values as the organizing framework for an increasing number of key processes at the college.

As outlined above, the values are used as a guide and a touchstone for decision-making throughout the college. Before adoption, decisions and actions are put through the values filter to ensure congruence.

The core competencies for faculty have been revised with the expectations organized under the headings of the six values. Feedback on the use of the values as an organizing framework was favourable. It allows for appreciation of the fact that positive attitudes

and behaviours are key competencies expected within our learning community in addition to the traditional set of instructional skills.

The staff recognition program was formerly organized under 13 categories, including differential categories for those providing instructional versus non-instructional/support activity, e.g., instructional innovation versus customer relations. Using the values as the organizing framework reduced the categories to 6 and enabled integration of the once separate categories for staff and faculty. All activity contributing to the excellence of the college can now be recognized without the divisive consideration of what was often referred to as 'the two sides of the house.' After all, we are all the same 'house'.

In August 2003, portions of the faculty orientation process were expanded to establish awareness and commitment to the values from the onset of membership in the Red Deer College learning community. Discussions with new faculty provide them with the context for connection of their daily contributions to the 'Big Picture' and appreciation of the attitudinal expectations in addition to the technical skill sets that they bring to the college.

In 2003, a pilot was conducted to introduce the values as part of the interview process for faculty. Applicants were provided with the values bookmark and asked to comment on the value that resonated most with them. This provided applicants with a sense of the expectations within the evolving culture and provided interviewers with additional information to evaluate the candidate's fit within our learning community.

In keeping with the value of community, the college has developed a number of partnerships. A booklet on values-based collaborative processes was designed for use in developing partnerships with the initial step being exploration of the values of the respective organizations and evaluation of mutual fit.

Key Success Factors

The key determinants of success in evolving towards a values-based organization are common to any successful change process and consistent with those discussed by Kotter and Cohen (2002).

Commitment and Support from the Top and a Guiding Team

The President and senior leadership team are committed to the values and to their integration into the fabric of daily activity at the college. They have committed themselves to a half-day per month for exploration and continued learning to live the values through leadership. They have assumed responsibility for guiding the culture change in evolving towards a values-based organization. Task teams coordinated by a member of Operational Leadership Team are

established to oversee various streams of activity related to new initiatives and culture change in the college.

The Vice President of Education established a dedicated position of Dean of Leadership Development and Learning Effectiveness to focus on the development of leadership capacity as well as individual leader development. This portfolio supports the expanded awareness of the values and linkage to the 'big picture' through planning and implementing venues for dialogue and consultation. She also coordinates the LEAD Advisory Team and is designing a leadership certificate program for staff.

Develop Clear Vision and Strategies

As described above, the President had a vision of a values-based organization. The collaborative, consultative strategies implemented to develop a shared set of values and to support the ongoing focus on living the values are themselves consistent with the values.

Ongoing Communication

As described above, there has been considerable investment in branding to create recognition, awareness, and consistent communication of the values. The Operational Leadership Team has established a communication task team to establish varied channels of communication and process transparency. Communications regarding the values, leadership principles, and the environment survey are sent from the President's office to all members of the RDC learning community. Feedback is sought and the need for adjustments is evaluated on an ongoing basis.

Support People, Facilitate Buy-In

There is a conscious effort to ensure that consultative, collaborative processes are used on a consistent basis. Feedback loops, such as that used in the finalization of the values logo and of the draft leadership principles, are employed to provide opportunity for input and to engage as many staff as possible in the process. A workshop to support personal transition through change has been piloted and will be made available to all staff to facilitate culture change, as well as specific change in their areas of operation.

Create Immediate Wins

There has been public recognition, sharing, and celebration of the documents on how various departments live the values in their programs. The results of the environment survey and the positive reaction of staff to revised documents using the values as the organizing framework have been highlighted.

Institutionalize Changes in the Culture

Considerable ongoing effort is directed towards keeping the values visible at the centre and in use in daily activity. The values are being used as the integrating framework for documents and processes wherever feasible. Policies, procedures, and processes are reviewed for congruence with the values.

Challenges

One of the strengths of the academic environment is the individual excellence of each faculty member. By virtue of their training, faculty often view themselves as independent professionals. In order to facilitate a values-based culture, it is necessary to expand the concept of individual excellence to include the collective contribution of individual excellence to the greater good. The challenge is to explore this shift in a way that respects the sensibilities of faculty. Schein (1997) states that individualism can be redefined "by enlarging your mental model to include collaborative behaviours while still seeing oneself as individualistic". Moxley (2000) discusses this issue in the community context of surrendering self-interest for the greater good so that the sum is greater than the parts. While this may reflect the desired outcome, self directed professionals may be more in tune with the notion by Cleveland (2002) "to modify behaviour just enough to accommodate others and the common purpose but not so much as to lose sight of where they themselves want to go".

Faculty and support staff have often operated in separate "silos" and have had limited interaction and opportunity to understand the commonality of their challenges and goals. Their collective strength as one system has not yet been fully recognized. As Wheatley and Kellner-Rogers (1999) state, "Systems are friendlier to life. They provide support and stability. They also provide more freedom for individual experimentation" (p. 33).

Time to participate in dialogue, to build shared understandings, and to work on organizational goals is limited by the core demands of teaching and learning, the tight organization of academic scheduling, and the focus on timely client service. Also, as in any complex environment, there are multiple overlapping priorities and demands. We need to continually weigh and act upon the cost benefit of the time investments.

Enhancement of a collaborative relationship between the faculty association and the college administration would facilitate joint development of the values-based environment.

Critical thinking is a desirable characteristic of a learning environment where ideas should be questioned and examined. However, this is often replaced by skepticism or resistance to changes that may be perceived by some as "flavour of the month". However, as stated by our President, "Our core values are a constant

and will remain as a guide as we proceed into the future" (personal communication, January 13, 2004).

The environment survey revealed that, overall, staff find their work interesting, expectations are clear, their opinions count, and they are encouraged to take initiative. A number of areas for continued development included communication, atmosphere of collegiality and trust, and leadership development.

Future Directions

Continued attention is required to fully institutionalize the college values within the context of an integrated system. We continue to engage individuals and departments in order to further grow commitment and consistent application of the values. We continue to examine all policies, procedures, and processes for congruence with the values. We are planning to expand the integration of the values into the hiring and orientation processes. Values exercises will be included in the leadership certificate program currently under development. Most importantly, we continue to work on "making the change stick" (Kotter and Cohen, p. 161) by keeping the values in the forefront, celebrating their application, and walking the talk. As Kotter and Cohen (2002) note, "Don't let up and show 'em, show 'em, show 'em" (p. 159). As we proceed with steadfast optimism and creativity, the journey continues. The culture is evolving and, a spirit of we is growing. In his 1989 book on the seven habits of effective people, Covey contends that the fundamental habit as you develop cultural norms and mores in an organization, is developing the spirit of we rather than me

The future is not a result of choices among alternative paths offered by the present, but a place that is created – created first in the mind and will, created next in activity. The future is not some place we are going to, but one we are creating. The paths are not to be found, but made, and the activity of making them, changes both the maker and the destination (John Schaar, 1970).

Conclusion

Izzo and Withers (2001) describe comments made by George Leonard, a martial arts expert turned leadership guru. He notes that people often wait for the perfect time and the perfect plan to initiate a new direction but the best way to get started is just to get started. Organizations interested in shifting to a values-based culture should initiate action with full involvement from the senior leadership team. As we experienced at Red Deer College, initial action will lead to further actions, and with perseverance, ongoing attention, and openness to evaluation along the way, the values will slowly become embedded in the culture.

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