Workforce Resources

Developing and Embedding Organisational Values and Behaviours

An online resource for NHS Wales

GIG CYMRU NHS WALES
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Introduction

"Value is not only created through people, it is co-created through people inspired by a common purpose, working to shared values, inspired and engaged, giving more of themselves to a common and shared endeavour."

Tony Manwaring, Chief exeCuTive of ToMorrow's CoMpany

This is the conclusion that is reached by academics, practitioners and others such as Robert Francis QC (Chair of the Mid-Staffordshire Report). Accepting that strategy, objectives and values are the founding pillars of organisations. Values are now often recognised as the most important element as they are the qualities that transform an organisation's mission and vision into reality.

As each of us is ruled by our own values and this generates our behaviour, ensuring that we work as effectively as possible together means agreeing to live by some shared values. Values, then, have to be developed by those who live by them so that they are owned by those using them. Once developed, they need to be reinforced at every opportunity through recruitment, training and personal performance accountability. Above all, they need to be lived rather than just being a written statement.

User Guide

- This interactive toolkit has been developed as a guide to help organisations develop their organisational values and behaviour standards.
- After reading this, you can navigate your way around the rest of the resource to get detailed information to help develop values and behaviours in your organisation.
- This resource is a ‘click and go’ guide which enables you to find the information you want on specific topics quickly and directly.
- The contents page shows what each section of the document covers. Click the section you want and you will go straight to it.
- When you are at a section page, click on the topic you are interested in to find out what information and tools are available. You can click on the button at any time if you want to return to the contents page.

Navigation guide

To help you navigate your way around the resource there are a number of clickable buttons that take you back or forward to set places in the resource:

takes you back to the beginning

takes you to the contents page

takes you to the 'Quick Guide' page

takes you to the 'Key Contacts and Further Help' page

takes you to the previous page

takes you to the next page

takes you to an external webpage

Contents

section 1: Why are values important to the best organisations? page 6

section 2: What is the evidence? page 7

section 3: What should be considered? page 8

section 4: Developing Values – Ideas for group facilitation page 9

section 5: Embedding and reinforcing organisational values page 27

section 6: Examples of best practice page 36

section 7: Further information page 47

Click on any of the titles above to take you to the relevant page.

Section 1: Why are values important to the best organisations?

Professor Michael West highlights this further having identified that those successful groups, teams and organisations have key things in common:

– They recognise they are a "team"
– The have shared goals/objectives
– They have a mutually agreed shared "way of doing things"
– They get together regularly to work out how to do things better

- Critically, "how we do things around here" needs to be at heart of what the group does and how it goes about doing it.

- With the values in place, teams, groups and organisations need to identify what behaviours support and contradict the values so that each of us can be clear about what's expected of us. Behaviours which live the values need to be reinforced whilst those that contradict them need to be challenged.

- Individuals and groups in successful organisations know their values and behaviours and use them to govern their decisions and actions. Leaders have a crucial role to play in helping others to do this.

Section 2: What is the evidence?

Links to some useful articles which provide the current evidence on the importance of values in organisations are shown below.

Articles
Mid Staffs Public Inquiry Report (Francis)
Achieving Organisational Change through Values Alignment
Challenging the Culture within the NHS
Principles not values
Organizational values a dynamic perspective
Web Pages
http://www.complexityandmanagement.wordpress.com

Section 3: What should be considered?

There are a number of codes of conduct which provide an assurance framework for public protection the following links are to the Regulatory bodies and Nationally Agreed Codes of conduct that relate to the staff groups below.

Medical Staff

General Medical Council – Good Medical Practice

Dental Staff

General Dental Council Standards

Nursing and Midwifery Staff

NMC Code

HCPC Allied Health Professionals

HCPC Standards of conduct, performance and ethics

Pharmacists

Royal Pharmaceutical Council, Medicines, Ethics and Practice

Healthcare Support Workers in Wales

Code of Conduct for HCSW in Wales

NHS Managers and HCSW Employers

Code of Conduct for NHS Managers

Code of Practice for HCSW Employers in Wales

Section 4: Developing Values – Ideas for group facilitation

The following links provide practical ways that the development of values can be facilitated in your organisation:

- *Using a World Cafe approach*
- *Personal Values Questionnaire*
- *Values and Criterial Equivalents Exercise*

Click on any of the italicised links above to take you to the relevant page.

Facilitation Ideas and Tools

The following links provide practical ways that the development of values can be facilitated in your organisation:

- *World Café*
- *Personal Values Questionnaire*
- *Values and Criterial Equivalents Exercise*

Click on the italicised links above to take you to the relevant page.

What is a World Café?

World Café Conversations are an intentional way to create a living network of conversation around questions that matter.

A Café Conversation is a creative process for leading collaborative dialogue, sharing knowledge and creating possibilities for action in groups of all sizes.

The challenges of life in the 21st Century require us to find new ways to access the opinions, wisdom, creative ideas and intelligence inherent within the workforce.

The need for collaboration, insight and coordinated action has never been greater.

Café Conversations are one way that communities, businesses, governments, and people from all walks of life are using to create a common purpose, share knowledge, and make more intelligent decisions together.

The seven design principles of World Café

1. Set the context
2. Create hospitable space
3. Explore questions that matter
4. Encourage everyone's contribution
5. Cross-pollinate and connect diverse perspectives
6. Listen together for patterns, insights, and deeper questions
7. Harvest and share collective discoveries

World Café

The methodology of the World Café is simple:

- The environment is set up like a café, with tables covered by paper tablecloths, some colored pens and refreshments. People sit around a table and have a series of conversational rounds lasting from 20 to 45 minutes about one or more questions which are pre-set
- At the end of each round, one person remains at each table as the host, while the others travel to separate tables. Table hosts welcome newcomers to their tables and share the essence of that table's conversation so far
- The newcomers relate any conversational threads which they are carrying – and then the conversation continues, deepening as the round progresses
- At the end of the second round, participants return to their original table – or move on to other tables for one or more additional rounds – depending on the design of the Café
- In subsequent rounds they may explore a new question or go deeper into the original one
- After three or more rounds, the whole group gathers to share and explore emerging themes, insights, and learnings, which are captured on flipcharts or other means for making the collective intelligence of the whole group visible to everyone so they can reflect on what is emerging in the room
- At this point the Café may end or it may begin further rounds of conversational exploration and inquiry.

Personal Values Questionnaire

Academics in the fields of change management, leadership and organisational development have more recently started to acknowledge the part that personal values play in determining peoples' perceptions of and response to different situations. This acknowledgement has potentially significant implications for managers. Firstly in understanding our own values better we can become more aware of factors that stimulate our behaviour and decision making processes. Secondly in better understanding the values of others we can tailor our change and communication strategies to best influence and positively motivate others to minimise resistance to change.

One of the leading researchers in this field, Shalom Schwartz describes personal values as:

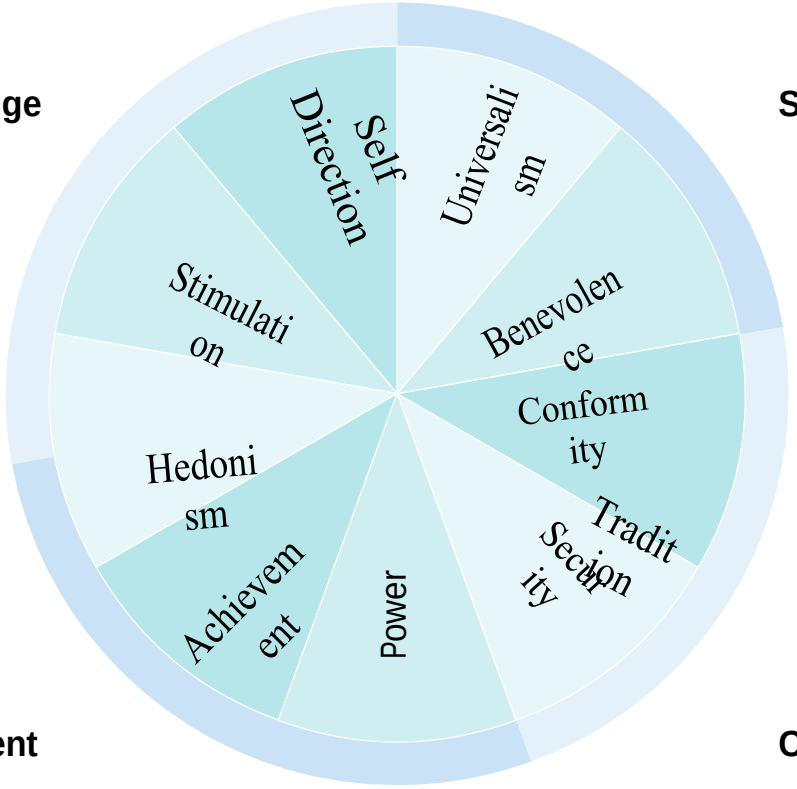
"concepts or beliefs, that relate to desirable end-states or behaviours, transcend specific situations, guide selection or evaluation of behaviour and events, and are ordered by relative importance."

sChwarTz 1996:4

He suggests that values are developed in the earlier period of human life and are generally formed by our late teens, early twenties. As we age we become increasingly aware of our values and those of others close to us. With maturity and practice, we become more able to control our response to situations and the behaviours of others that challenge our values by temporarily flexing our response. However, our values reassert themselves in our behaviour as the situation changes just as bamboo bends in a strong wind and then reverts to its former state.

Personal Values Questionnaire (cont.)

Schwartz's research identified ten values that are grouped under four super ordinate headings which he labels as openness to change, self transcendence, conservation and self enhancement. Each of us has differing relationships with each value for example a person might have a particularly strong affinity with self direction whilst having a weak affinity with security.



Personal Values Questionnaire (cont.)

Schwartz also suggests that individual values are diametrically opposed to each other for example a person for whom self direction is a primary value might least understand or prefer the behaviour of a person for whom security is a primary value. However a person might have self direction as their primary value and the diametrically opposite security as their secondary value. If this occurs then situations that require a person to choose between these values are often very challenging.

He has also researched the impact that values have on our vocational choices. For example it is very common for universalism to be a primary value of those in caring professions such as nursing and the allied health professionals. Similarly tradition and conformity are very common amongst those who choose the finance profession.

We live much of our lives without being overly conscious of our top values. However when faced with a situation or behaviour that we dislike, our top values often stimulate us in to action or at least passive resistance. It is also believed that when living our values we are most likely to be performing at our best and most happy. One thing is certain; organisations are full of continuous interplays between individual, professional and organisational values, thereby making change management and leadership a very complex process within the NHS.

Personal Values Questionnaire (cont.)

so, what are your top three personal values?

Read down the left hand column of the table on the next page to identify which three sets of values terms you most closely associate with. Then read across to the right hand column and the associate value type. The value type expresses what motivates people and its classification.

example 1

If freedom, creativity, independent, choosing one's own goals etc. is highly appealing then independent thought and action is your motivation which is classified as Self Direction. When you have identified your top three values, work out their order by asking yourself the question which one of these three can I live without. This will identify your third value. Then ask the same question of the remaining two values to identify your second and first value.

example 2

Self Direction, Universalism and Stimulation are Bob's top three values. He recognises that of these three he can most live without "Independent thought and action" which is Self Direction. He then asks the same question in relation to Universalism and Stimulation, recognising that he could not live without variety and stimulation which is Stimulation. Therefore his top three personal values in ascending order are Self Direction, Universalism and Stimulation.

Personal Values Questionnaire (cont.)

value Terms	value Type
Freedom, creativity, independent, choosing one's own goals, curious, self respect	Self Direction – "Independent thought and action"
An exciting life, a varied life, daring	Stimulation – "Need for variety and stimulation"
Pleasure, enjoying life	Hedonism – "Pleasure or sensuous gratification for oneself"
Successful, capable, ambitious, influential, intelligent	Achievement – "Personal success through demonstrating competence according to social standards"
Social power, authority, wealth, preserving, my public image, social recognition	Power – "Attainment of social status and prestige, and control or dominance over people and resources"
Clean, national security, reciprocation of favours, social order, family security, sense of belonging, healthy	Security – "Safety, harmony and stability of society, of relationships and of self"
Obedient, honouring of parents, politeness, self-discipline	Conformity – "Restraint of actions, inclinations and impulses likely to upset others and violate social expectations or norms
Accepting my portion in life, devout, humble, respect for tradition, moderate, detachment	Tradition – "Respect, commitment and acceptance of the customs and ideas that one's culture or religion impose on the individual"
Helpful, honest, forgiving, loyal, responsible, a spiritual life, true friendship, mature love, meaning in life	Benevolence – "Preservation and enhancement of the welfare of people with whom one is in frequent personal contact"
Protecting the environment, unity with nature, a world of beauty, broad-minded, social justice, wisdom, equality, a world at peace, inner harmony	Universalism – "Understanding, appreciation and protection for the welfare of all people and for nature"

Personal Values Questionnaire (cont.)

Using the personal values questionnaire in a workshop

- Ask participants to read the personal values questionnaire and follow the instructions to help them identify their own values
- Write down each of the 10 values on different pieces of paper, and place on the floor in a large circle
- Ask participants to move to their most important value
- Recognise that values are not extremes and are generally only really obvious when our own value is contravened
- Encourage discussions: “what does this tell the group about its predominant values?”; “what could this mean to the group and to others?”; “what’s the predominant value of the your team, the organisation?”
- Repeat with second and third values – draw out observations from others
- Use the personal values to draw out discussions on developing a set of group/ organisational values which can be commonly shared. Draw out discussions on when these are most likely to be crossed and how tensions should be dealt with.

Values and Criterial Equivalents

Introduction to Values and Criterial Equivalents

Values are those states that are important to us. They are usually stated in abstract terms, for example : honesty, love, friendship, loyalty, fun, health, integrity, intimacy and freedom. There are also organisational values (usually implicit) in the culture and actions of any business. Transformational leaders appeal to the values of the people they lead. These are the keys to instrinsic motivation. To elicit individual values, ask questions like :

- What is important to you about..?
- What do you get out of doing this..?
- What matters to you here…?
- Why is that important to you...?
- Why do you want this...?
- What is important to you about achieving this..?

Values may be context dependent, for example, what people value in relationships may not be the same as what they value in their professional life. People tend to have core values that stay stable between different contexts. A core value is freely chosen, prized and acted upon.

Rules for Values

It is important to know whether your values are being fulfilled or not

- How do you know when your values are being fulfilled?
- How do you know when your values are not being fulfilled?

You will notice specific evidence that will let you know when your values are being fulfilled and when they are not. This evidence will be sensory specific – what you see and feel.

All our values have what NLP calls criterial equivalents – specific behaviours that let us know when a value is being honoured and when a value is not. These are the rules of behaviour we set for others and ourselves.

To find these criterial equivalents, ask questions like :

- What are the specific behaviours that let me know that my values are being met?
- What is a behaviour that would honour this value?
- What are the behaviours that let me know this value is not being met?
- What actions by others really make me frustrated?
- Do I feel particularly annoyed when other people do something specific, or not do something?

It is important to know your own criterial equivalents and the criterial equivalents of other people, or else we may spend a lot of time giving to others what we wish to receive ourselves, and in turn, not getting what we want from others.

Critical equivalents can be limiting if :

- They are very hard or impossible to achieve
- There are many rules for how your values can not be met and few for how they can be fulfilled
- You have no direct control over whether your values are met or not.

Values and Criterial Equivalents (cont.)

How to illicit organisational values

It can be seen that the achievement of organisational values alignment, necessitates the implementation of a process that involves two distinctive but interdependent actions.

Such a process needs to first involve a deliberate values clarification procedure, specifically designed to co-operatively discern the essential values that need to characterise the organisation in order for it to successfully achieve its vision and purpose.

personal alignment

It is proposed that the key to positively influencing the employee's individual consciousness is in helping her/him to know how the organisation's strategic values are formed and how they are to be applied in order to create an appropriate and successful organisational culture.

Just as it is important to know and understand the formational influences on one's personal values so as to recognise how they are able to influence one's behaviour, so too, it is argued, that organisational employees need to know and understand formational factors of any preferred strategic organisational values.

The people need to be able to clearly see how these values are important to the organisation's culture and how the application of these values can lead to a better and more successful organisation.

They need to be able to know and understand the antecedent forces that support the adoption of these preferred values.

They need to be able to see how the application of these values will be able to change the organisation for the better. It is in this way that the employees are able to develop alignment between their personal values and the perceived strategic values of the organisation.

framework

A conceptual framework showing the constituent aspects of an organisation's culture that play an integral part in the achievement of values alignment:

1. Core Mission

This is the collaboratively discerned 'controlling insight' as to that which is at the very heart of what the group is striving to achieve in order to create long-term success of the organisation. It describes what the group needs to do and as such, it is distinct from, but related to, the organisation's overall vision and mission statements.

The Core Mission is a single sentence that uses rich descriptive words to describe not only what is seen as the core business of the collective group but the manner and means for achieving it.

As a controlling insight, the Core Mission must :

- Apply across a wide range of situations
- Succinctly describe what would result from the achievement of excellence
- Guide essential action.

Values and Criterial Equivalents (cont.)

In describing these outcomes, the Core Mission becomes a source of potential organisational values in the mind of all those involved. Hence, these perceived values have meaning for those involved since each individual can readily understand the significance of these values and therefore, is in a better position for being able to willingly support and adopt them.

2. performance Capabilities

These are the strengths and weaknesses of the group, and each individual with respect to the achievement of the Core Mission.

Discussion of these crucial ingredients enables the group to develop confidence in its ability to achieve its Core Mission by either reinforcing its group and individual strengths or by overcoming its development needs through specifically targeted group, or individual professional development.

In this way, it affirms the existing talent and worth in the group and the individuals, while confirming the organisation's commitment to its employees through its support for strategic professional development. Again, this open and transparent process provides clarification as to what is valued and why it is valued. In this way, the meaningfulness of such values is reinforced in the minds of the group members.

3. success indicators

These are the perceived logical consequences that will be realised if the group is able to achieve excellence in the way it goes about its Core Mission.

Getting the group to list the indicators of success that would naturally result if every group member was fully committed to the Core Mission, provides motivation and stimulus to each individual to become engaged and to provide his/her quality contribution to the group's activities. In this way, there is increased motivation for each individual to develop an affective organisational commitment and to adopt the group's nominated strategic values.

4. operational values

These are the nominated strategic values that appear as a natural consequence if each of the previous antecedent constituent parts of the organisation's culture is to be achieved.

However, since the reflection upon the stated Core Mission, the acknowledged Performance Capabilities, and the desired Success Indicators produces an abundance of nominated values, it is essential that a secondary process is implemented that allows the group to prioritise the most important values up to a suggested maximum of ten values.

This ensures that everyone is more likely to be concentrating on applying the same values to their work environment. Having too many values is more likely to diffuse the commitment as it would be difficult for every employee to equally apply his or her self to a wide array of nominated organisational values.

5. guiding Beliefs

These are the agreed ways in which the application of each of the prioritised strategic values will produce a positive outcome for each employee as well as the group overall.

Values and Criterial Equivalents (cont.)

The creation of such Guiding Beliefs is done simply by converting each prioritised strategic value to a belief by asking the group to complete the following sentence with every value :

"we value (value) because…."
Every time we have worked through this process with a group, people have commented on how powerful the experience was. To feel a group of people align on a single and unanimously agreed belief about a value, is unifying and empowering. It has an added benefit of being a wonderful team-building experience.

6. performance indicators. Critical equivalents (behaviours)

These are the behavioural outcomes that can be expected to be seen, enacted by an employee authentically living out these beliefs and values. The process so far has only developed a cognitive and emotional commitment to the nominated strategic values.

By getting the group to publicly predetermine those behaviours that logically result from an employee proactively living out the strategic value not only makes it quite clear what is expected from each employee, but each person knows that others will be able to judge his/her personal commitment to these values by their behaviour.

In this way, it is more likely that each employee will behaviourally commit to these beliefs and the values as well.

Values and Criterial Equivalents – exercises: an introduction

Values

What do we understand by this term?
(10 mins intro)

Values are those states that are important to us.

They are usually stated in abstract (intangible) terms, for example, honesty, love, friendship, loyalty, fun, health, integrity, intimacy and freedom.

But can be context dependent –organisational/ team/group etc.

Values Alignment

Relationship between value and culture?

Interdependency between the achievement of values alignment within an organisations culture and the successful achievement of organisational change.

Long-term goals rather than short-term behaviours. (An organisations culture is reflected by what it values, its shared beliefs and individual and group behaviours)

As such, the culture of an organisation is said to have a profound influence on the behaviour of every individual within the organisation.

The culture of an organisation serves as a force, drawing organisational members together and creating a sense of cohesion which acts as an informal control mechanism, helping to define acceptable behaviour.

In addition, the organisational culture provides employees with information that is necessary for them to function within the organisation, and guidance for the employees in knowing how they can be more supportive of the organisation's mission.

The need to nurture an accommodating consciousness within each employee, by cultivating alignment between his/her values and those that underpin the success of the organisation.

Values are the invisible threads of culture

Where the organisation cultivates alignment between organisational and individual values, it induces more positive employee engagement such as organisational commitment and job satisfaction.

Strong relationships have strongly aligned values because values focus people's attention. They lead to the alignment of everyone's efforts, which in turn strengthens relationships.

When an organisation has a defined set of values that are embodied by all employees, there is less need for overt management and control.

Values and Criterial Equivalents – exercises

Action One (12 mins)

What values are important to you that characterise the organisation in order for it to successfully achieve its vision and purpose?

Ideas on a flipchart from all.

One large group or break into smaller groups.
(30/35 values at this stage possibly)

Action Two (8 mins)

Each person looks at all the values that have been generated and decides on a group of the most important to them.

What are the core ? What are less important? When decided, write on the flipcharts (reduce duplicates 10 mins)
(20/25 values at this stage)

Action Three (10 mins)

As a group, agree on a number of the most important values, but do not try to put them in any order.

Whole Group discussion or split into smaller groups (reduce duplicates 10 mins)
(15/18 values at this stage)

Action Four (15 mins)

Group agrees a list of ten common core values
Vote using stickers or dots (10 each)
Write up the 10 organisational values chosen

Action Five – Criterial Equivalents (75 mins)

Elicit criterial equivalents for each core value from each member of the group
(sensory specific – see hear, feel)

Ask the questions :

- How do you know this value is satisfied, what sensory specific behaviours tell you this value is fulfilled?
- How do you know this value is not being met, what sensory specific behaviours tell you this value is not being fulfilled?

Share the feedback on your criterial equivalents with the group discuss and agree on the final versions.

Conclusion

The full power and impact of this comprehensive values alignment process is only accomplished when each and every aspect is examined in the order suggested.

In this way, an all-embracing understanding of the culture of the organisation is gained. As a result, the individual is able to more easily align his/her personal values with the organisations nominated strategic values, while sensing heightened workplace engagement, meaningfulness and fulfilment.

Action Six – Next Steps (30 mins)

Secondly, this process needs to involve a means by which each person is encouraged to proactively support the application of these values in their everyday organisational behaviours.

At the very core of organisational success, there needs to be a deliberate and comprehensive organisational values clarification and alignment process.

Values, Criterial Equivalents and exercises (cont.)

Action Plan

- How might this be done?
- How are you going to share these values?

Team Values Exercise

This exercise is about leading by responding to beliefs and values in a group.
This is an exercise for a team of people. What do we understand by values?

- States that they are important to us
- State in abstract terms : love, friendship, fun, health, wealth

What is important to you about effective team leadership?
Values can be context dependent, although core values can remain stable. (3mins)

First of all, each member of the group answers the question
What values are important to you that characterise the team in order for it to successfully achieve its vision and purpose? (12 mins)

Examples:

- Self disclosure, sharing one's own values and beliefs
- To coach individuals
- To set clear goals
- To avoid devaluing or putting down any group member
- Congruence with your own beliefs and values
- Keeping options open
- Avoiding damaging conflict
- To encourage the group members' individual creativity and ideas.

Next, look at the values that have been generated and decide on a group of the most important as individuals. (7mins)

- What are core for you?
- What are the less important values?

Then, Agree on a group of the most important values (5-10) but in no order of importance. (8mins)
Example of core value group:

- Show respect and acknowledging values and beliefs
- To set clear goals
- Keeping options open
- Avoiding damaging conflict
- To coach individuals

Next, the group agrees a list of four to six common core values.
Elicit criterial equivalents for each core value from the group in groups (60mins)
(sensory specific – see, hear, feel)

Ask the questions :

- How do you know this value is satisfied, what sensory specific behaviours tell you this value is fulfilled?
- How do you know this value is not being met, what sensory specific behaviours tell you this value is not being fulfilled?

Share the feedback on your criterial equivalents with the group discuss and agree on the final versions. (15mins)

Section 5: Embedding and Reinforcing Organisational Values and Behaviours

What can we do to help people live the values and show the behaviours? Click on the italicised headings for more information.

- ***Recruitment:*** Getting people in organisations who can live the values of our organisations ideally starts at the recruitment stage. This link will provide you with support and case studies as to how you can do this.

- ***Induction:*** Helping new colleagues understand and live the values can be done at every stage of induction. This link will provide you with information as to how you could do this.

- ***Training:*** every time a colleague spends time learning how to do something better provides an opportunity to reinforce our values.

- ***PADR:*** ongoing 1:1 discussions with colleagues are the most important part of recognising/challenging positive and negative behaviours which do not live our values.

- ***Team meetings:*** one of the best ways of living and reinforcing the values is when people are together. So any team meeting, committee or group discussion can be use to focus on values.

Values Based Recruitment

Principles of Values Based Recruitment

- Know your organisational values (these should really be developed by all staff so that they are owned by everyone)
- Identify behaviours which demonstrate the values in action (positive and negative behaviours)
- Pick approaches which allow candidates to demonstrate the behaviours and which you can measure (both positive and negative)
- Use as many stakeholders as possible to assess and measure the behaviours (360˚, internal and external to the team/ organisation)
- Make the behaviours the key aspect of selection by weighting scoring appropriately (i.e. at least 50%)
- Monitor, review and evaluate the impact of introducing values based recruitment.

Benefits of values based recruitment

Values based Recruitment provides organisations with more comprehensive information about candidate's suitability for a position, taking into account the individual's values and behaviours and how they align with those of the organisation. The organisation will also demonstrate its ongoing commitment to its corporate values and behaviours which help create a safer healthcare environment for children and vulnerable groups.

Values Based Recruitment (cont.)

Considerations when recruiting

- Before commencing the recruitment process the manager should identify the behaviours that would be required of an individual in that post and relate them to the organisational values.

- Once this has been done the values and behaviours can be weaved within each stage of recruitment and selection. For example, hiring managers should ensure that values and behaviours are reflected in the person specification which can then be assessed at short listing stage. In addition to this, interviews should include situational questions which help the panel to assess required behaviours.

- It is recommended that NHS organisations diversify their assessment methods in order to improve structure, validity and reliability of the selection process. For example including psychometrics tests can help identify who has the aptitude and attitude for a particular post within the organisation.

Values Based Recruitment (cont.)

Recruitment and Selection

The stages below provide some suggestions organisations can adopt through the various stages of the recruitment process.

advertising

- Hyperlinks to local Health Board values can be included on the further links section of NHS Jobs, or included in the footer of the advert.

- Hiring managers should consider reflecting values within the content of the Advert (see below case study).

Job descriptions/Person Specifications

- A paragraph on organisational values can be included within the content of the standard Job Description template.

- As mentioned earlier desired behaviours should be reflected in the Person Specification.

assessment

Short listing

- If the Person Specification reflects desired behaviours, then short listing will be in line with organisational values.

Interviews

- Interview questions should have clear connection to organisational values, vision and competencies, e.g. Ask someone to give examples of where they demonstrate the values such as “how have you shown respect to others in your role?”

Values Based Recruitment (cont.)

Appointment

Conditional Appointment Letters

- Local Health Board/trust values leaflet could be included in the pack (however, this would need to be an electronic version)

Contract

- The contract of employment is an agreed all Wales document and cannot be amended. However, organisations may opt to include separate literature about local values

General

- It is recommended that wherever possible policies and procedural documents should include signposting to the organisations values and vision

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Useful Links

http://www.cipd.co.uk/pm/peoplemanagement/b/weblog/archive/2013/01/29/

how-to-embed-your-company-values-2008-02.aspx; (accessible to CIPD members only)

NHS Employers Values Based Recruitment

Induction

The term 'induction' is generally used in a workplace context to describe the whole process whereby employees adjust or acclimatise to their jobs and working environment. Every organisation, large or small, should have a well-considered induction programme. Employees who have a well thought-out induction are more likely to stay with the organisation, they integrate well into the team, morale is better along with better productivity and working to their highest potential.

David MacLeod and Nita Clarke explains in their report 'Engaging for Success' that one of the four broad enablers to ensuring employee engagement was that of integrity, ensuring that behaviours within the organisation were consistent with stated values which leads to trust and a sense of integrity from the Board right through to the front line. Therefore with this in mind it is vital to ensure that organisational values are shared, discussed and debated with all new employees on entry into the organisation to ensure full understanding of the connection with the organisation and the expected behaviours.

Betsi Cadwaladr University Health Board

During a series of Big Conversations and World Cafe's with staff in 2011, the organisation developed its values and behaviour statements. There is a growing body of evidence to suggest that strong organisational values can lead to real tangible improvements in performance and engagement with the organisation, with this in mind we dedicated the first half day of the Orientation programme for new employees solely on discussing and understanding the values and how these relates to each and every member of staff regardless of their role within the organisation. The session is facilitated using a world cafe approach in order to encourage wide discussion and debate of the values and behaviours along with local videos and case studies relevant to the organisation. For more information contact *nia.thomas4@wales.nhs.uk* or *joy.lloyd@wales.nhs.uk*

Ongoing training and development

Ensuring that there is continuous learning within an organisation is important because:

- people need to have the opportunity to grow and develop throughout their careers/lives
- organisations can only grow and develop through their people
- successful organisations ensure their people have the appropriate levels of skills, knowledge and attitude to fulfil their roles
- when money is short, only those organisations that are the most efficient and effective will survive – those organisations will need the most efficient and effective people.
- only organisations that can respond to their environment, their customers, etc, and change accordingly will move forward – these organisations will need people that can learn and grow.

To become a learning organisation it is important to have a set of values, behaviours and attitudes that support the process of continuous learning throughout the organisation. Through learning, individuals can re-interpret their world and their relationship to it. A true learning culture continuously challenges its own methods and ways of doing things. This ensures continuous improvement and the capacity to change.

Value based succession planning is another aspect which is important to ensure the success and sustainability of an organisation. It can support the identification of requirements for the organisation's leadership strategy and support the development of appropriate career pathways for succession planning.

Betsi Cadwaladr University Health Board

The values and behaviour statements are directly linked to learning and development programmes to ensure the individual and manager can identify the relationship between the learning and the values within the organisation. It also raises awareness of the values and behaviours themselves through a consistent method of communication. On all flyers advertising learning and development within the organisation there is a statement demonstrating which values are covered within the learning programme. For more information contact *nia.thomas4@wales.nhs.uk*

PADR / ongoing 1:1s

- The relationship between managers and their staff is shown to be the critical influencer as to what individuals choose to do. Strong trusting relationships allow both parties to have honest conversations about behaviours both their own and others so this provides an ideal place to explore and reinforce our values.

- By providing colleagues with as much choice as possible about what they do and how they do it within the organisation's "context" (e.g. values) will help each individual to understand and commit to what they need to do. In essence, we need to help create a "clear line of sight".

- By supporting every member of staff to contribute to the development of the strategy and own any actions that need to happen, they will better understand the Trust's vision, purpose, aims and values. Effective two-way conversations allow for everyone to have a real voice and contribution in shaping, planning and delivering better care for service users. Above all it ensures that each of us chooses and owns what we do so it gets the best from us which ensures that we are all committed to delivering all aspects of the best possible patient care.

- By being encouraged to choose as much as possible about what we do and how we do it, we will develop greater ownership of our values, and through this, it allows us to be open to feedback about our behaviours when attempting to live our values. Ideally, every conversation we have should focus on what we have done/not done to live our values and this should be recorded in any documentation.

Useful Links

Developing engaging leadership

Link to the PADR good practice web page

Meetings, teams, groups, committees

Professor Michael West highlights that successful groups, teams and organisations have key things in common:

- They recognise they are a "team"
- Shared goals/objectives
- A mutually agreed shared "way of doing things"
- Get together regularly to work out how to do things better.

Critically, he identifies that "how we do things around here" needs to be at heart of what the group does and how it goes about doing it.

Therefore, his recommendation is that every single group/team meeting, values and behaviours are part of the discussion. It is suggested that this is focused in a positive way by celebrating successes as well as sharing any learning and that this should be at the start of any time together.

Importantly, by surfacing values and behaviours at the start of any group/team meeting, it encourages individuals to give feedback (supportive and challenging) about the congruence of group discussions, decisions and behaviours with our values.

Based on research into Appreciative Inquiry as well as Service Improvement methodology, it is also recommend that every group/team time ends with a similar approach so that any immediate lessons about values are learnt.

These might be useful principles:

- Always celebrate successes first and as many of them as you can
- Everything was done for the right reason at the time – giving and receiving feedback should be constructive and not attacking/ defensive
- Everything that has been done is an opportunity for feedback
- Involving as many people as appropriate/ possible in reviewing is an important way of improving engagement and ownership
- It's vital to do something with the feedback – if nothing can/will happen with the feedback, then it's generally better not to ask.

useful Links

Michael West blog

Section 6: Best Practice / Case Studies

Developing Organisational Values

- *Betsi-Cadwaladr University Health Board*
- *Cardiff & Vale University Health Board*
- *Welsh Ambulance Service Trust*

Embedding and Reinforcing Organisational Values and Behaviours

- *NHS*
- *Non-NHS*

Click on the italicised links above to take you to the relevant page.

Ensuring every role counts at Betsi Cadwaladr University Health Board

The Big Conversation – Defining our values

Shared and enduring values are at the heart of successful organisations. They provide purpose to all within the organisation and communicate expectations and service commitments to those who come into contact with the organisation. For the Health Board a strong set of values provide the basis around which tocoalesce the various strands of a sustainable engagement strategy driven by clinical leadership, openness and support for innovation and improvement.

How were the values formed?

A variety of methods were utilised to engage with staff under the banner of the 'Big Conversation'. Appealing to different engagement styles was important to us so we developed visual, pictorial and kinaesthetic materials.

Events included:

- Big Conversation events and forums
- World cafes and smaller drop-in sessions
- Intranet 'chat' forum
- Questionnaries
- Roadshows.

Throughout the engagement events there was a real 'buzz' from staff and a genuine interest and determination to create values that would be meaningful and could be easily related to in day to day practice.

The Big Conversation – Defining our Values

"We believe it is most helpful to see employee engagement as a workplace approach designed to ensure that employees are committed to the organisation's goals and values, motivated to contribute to organisational success, and are able at the same time to enhance their own sense of wellbeing. Engaged organisations have strong and authentic values, with clear evidence of trust and fairness based on mutual respect, where two way promises and commitments – between employers and staff – are understood and fulfilled."

MCLeoD, D., CLarke, n., 2009. engaging for suCCess: enhanCing perforManCe Through eMpLoyee engageMenT

1. Introduction

Shared and enduring values are at the heart of successful organisations. They provide purpose to all within the organisation and communicate expectations and service commitments to those who come into contact with the organisation. For the Health Board a strong set of values will provide the basis around which to coalesce the various strands of a sustainable engagement strategy driven by clinical leadership, openness and support for innovation and improvement.

Leading organisations and leading brands share many common characteristics and arguably the most important of these is achieving consistency between internal behaviours and external messages in order to give them total credibility in the eyes of employees, service users and partners. In order to achieve this, staff need to be aware of, understand and be committed to the values of the organisation. This is not something that can be achieved overnight.

As defined in the Health Board's Organisational Development Strategy, Lewin's three stage model of culture change has been an important part of the process and methodology used to commence the work on defining the Health Board's value statements. The proposed Workforce Engagement Strategy accompanying this report will be a key feature of the work required to embed the values.

The Big Conversation – Defining our Values (cont.)

2. Why do we need values?

There is a growing body of evidence to suggest that strong organisational values can lead to real, tangible improvement in performance. The benefits of strong local values are:

1. Improved patient experience
2. Improvements in patient safety
3. More staff satisfied with their jobs and workplace
4. Staff who identify more strongly with their organisation
5. Staff who feel more personally successful, and more supported in that success by the organisation
6. Long term organisational success and impact
7. Increased public trust in professionals

(nhs eMpLoyers 2009)

The ultimate goal is for the values to be an integral part of everyone's working life, no matter what their individual role. Value statements will also help us to define and develop our culture – what we do and how we do it. Publishing the values of the Health Board, making them part of our culture and demonstrating them throughout the organisation will help us to develop a shared way of behaving.

To support the highest quality of care at the front line, there is an organisational requirement for leaders to model the appropriate behaviours and to communicate these at every opportunity.

The Big Conversation – Defining our Values (cont.)

3. Methodology – how were the values formed?

Following an extensive period of consultation with clinical, non-clinical and managerial staff, service users and volunteers, the Health Board has identified a set of values and underpinning behaviours.

A variety of methods were utilised to engage with staff under the banner of the 'Big Conversation'. Appealing to different engagement styles was important to us so we developed visual, pictorial and kinaesthetic materials. Events ranged from formal Big Conversation forums to world cafes and smaller drop-in sessions across community sites. The intranet was also utilised to engage staff through the use of a 'chat' forum to capture ideas and views. This forum had 2,631 hits in the period between 1st February and 25th May 2011.

In order to ensure the engagement activities involved service users and the public in addition to our staff, a questionnaire was designed for service users, carers, the general public and staff. 301 questionnaires were returned. All questionnaires were transcribed and themed/ categorised. World cafes were also held for volunteers across the geographical area of the Health Board.

Throughout the period of engagement, presentations and interim progress reports have been provided to a range of committees and forums including the Partnership Forum; Local Negotiating Committee; Health Professions Forum; Stakeholder Reference Group and the Remuneration and Terms of Service Committee. Announcements and articles have also featured in the Corporate Notice board and Clebran/Talk about magazine.

Once the engagement events were completed a stakeholder group of key facilitators involved in a range of engagement activities participated in a workshop to shape the values and behaviour statements. All the values that had been categorised were circulated at the workshop and great care was taken to include the essence and language of all views represented in the values categories and behaviour statements. Two key guiding sets of principles were also followed during this workshop, the first were the Health Board's 5 strategic themes; Making it safe; making it better; making it sound; making it work; and making it happen; the second were the FREDA principles which are Fairness; Respect; Equality; Dignity; and Autonomy.

Throughout the engagement events there has been a real 'buzz' from staff and a genuine interest and determination to create values that would be meaningful and could be easily related to in day to day practice.

The Big Conversation – Defining our Values (cont.)

4. What are the identified values and associated behaviours?

We can make it sound by **putting patients at the heart of everything we do**

- Take pride in the service we provide and display high ethical standards in order to improve standards of care
- Involve patients and their families in treatment decisions and outcomes
- Demonstrate respect for privacy, choice, dignity and independence
- Ensure each patient feels they have been listened to and treated as an individual
- Show empathy and be aware and sensitive to an individual's needs.

We can make it happen by **working together for patients**

- Work together positively to achieve efficiency, forward thinking and vision
- Promote an environment of mutual support and cooperation among individuals and teams
- Embrace challenges, support each other and work together to overcome problems
- Develop a unified standard of excellence for performance and delivery of care
- Always do what is right, even when challenged.

We can make it work by **learning and being innovative in all that we do**

- Use our energy, enthusiasm and initiative to invest in our success
- Encourage ownership and involvement in service improvement
- Explore and challenge the boundaries of technology, clinical practice and research
- Encourage and support creativity to foster ideas for our future success and demonstrate a 'can do' attitude
- Maximise your own and others' potential through learning, nurturing, development and shared wisdom.

We can make it safe by **valuing and respecting each other**

- Share, respect and celebrate our achievements together
- Be approachable, visible, professional and inspirational as a role model for others
- Engage, listen and value the contribution of others
- Appreciate the qualities and diversity of each individual and work together towards a common purpose
- Hold ourselves, individually and together, accountable for our decisions, actions and performance.

We can make it better by **communicating openly and honestly**

- Demonstrate honesty and integrity in our decision-making and communication
- Build trust and display transparency in our actions as well as our words
- Be professional, polite, courteous, and non-judgemental in our communication
- Be honest, respectful and sincere in giving and receiving feedback
- Display accuracy, simplicity, respect and clarity in communications with our service users.

The Big Conversation – Defining our Values (cont.)

5. What needs to happen now?

- The Board is asked to agree/adopt the values and behaviours
- The values and behaviours will become a key part of everything that we do as an organisation, being included in job descriptions and in our publications
- This will be reinforced through employee development (e.g. induction, Personal Development Review)
- The values and behaviours will be included in all leadership development activities.
- There needs to be a pictorial/logo representation to identify and communicate the value statements, this will be submitted to the Board once the value statements have been approved
- Following approval by the Board of both the value statement and associated logo it is proposed the values and associated behaviours will be disseminated utilising a small marketing strategy (to be approved by the Executive Director of Workforce &OD) to firstly raise awareness and then embed the values and behaviours into existing events such as recruitment activity, induction, leadership and management development programmes and the Health Board's publications. This marketing strategy will also consider the longer term vision of how the values can be demonstrated and evidenced throughout the whole organisation and across all staff groups
- There needs to be close liaison with the Governance & Communication Corporate Function to support the marketing strategy as it is crucial that staff can visibly see progress and development following the launch of the Value statements
- As identified in the proposed Workforce Engagement Strategy, measurement of staff compliance with, and the success of the proposed behaviours can be measured through organisational culture and staff surveys, personal development reviews and development programmes. It is proposed to develop a team toolbox which will allow teams of staff to have discussions at team meetings regarding what the values mean to them in their roles and to their team and how they can demonstrate the behaviours which underpin the values and provide evidence of this behaviour.
- The Personal Development Review needs to be revised to incorporate objectives based around the 5 values.
- The Staff Achievement Awards needs to be reviewed to incorporate the 5 values.

Developing Organisational Values and Behaviours – Good practice examples

Cardiff & Vale UHB

'The values and behaviours displayed within our organisation play a significant part in the engagement and wellbeing of staff which evidence shows is linked directly to outcomes for patients, service users and the public. This guide is our first step towards helping the people we work with bring these values to life at different contact points between managers and staff.'

The Cardiff and Vale guide can be accessed via the link below.

Useful Links
Cardiff & Vale Values

Developing Organisational Values and Behaviours

Welsh Ambulance ServiceTrust

In 2009, the Trust developed its values with all staff. Starting with workshops, draft values were sent to everyone at home to consider. Following feedback, these were finalised and a draft Staff Charter identifying behaviours was created and again shared with all staff. With everyone having had the chance to contribute, the values and behaviours were finalised and have been reinforced through recruitment, induction, training, PADR and as the basis of any decisions.

Developing Organisational Values and Behaviours – Good practice examples

Case Studies – NHS

Welsh Ambulance Service NHS Trust
Having involved all staff in the development of our values and demonstrating what these meant in our Staff Charter, values-based behaviours have become the main part of our selection process. A key value for us is inclusively helping everyone do things for themselves, with the main behaviour on being able to quickly build meaningful and trusting relationships with others, to that we can help others do the best they can. So, we designed our processes so that we measure the impact of how well someone builds rapport and influences others in groups.

We continue to develop what we use as we learn and for more information contact *james.moore2@wales.nhs.uk* or *phillippa.doble@wales.nhs.uk*

Oxford University Hospitals
Oxford University Hospitals are undertaking a VBI project in conjunction with the NSPCC

http://www.ouh.nhs.uk/about/vision-and-values/value-based-interviewing.aspx

Developing Organisational Values and Behaviours – Good practice examples

Case studies: Other sectors

hsBC

This link describes the recruitment process to potential applicants, the article has been written in very user friendly language in order to engage the individual. It's a very clear example of an organisation that has fully embraced its values and brand and has incorporated them into all aspects of its recruitment and selection.

http://www.jobs.hsbc.co.uk/111-en/FeaturesAndPromotions.aspx

pizza express

Pizza Express' recruitment page is an interesting example of how an organisation can reflect their brand through their recruitment approach whilst targeting the potential market. Throughout the site the words 'fun, flavour and flair' are used, it is evident from the design that they are targeting fun, younger candidates by using pizza slices to click to find job opportunities.

http://www.pizzaexpressyourself.com/apply-now/

nspCC

This factsheet introduces the concept of Value-based interviewing (VBI) and explains how it can help organisations to recruit the most suitable people to work with children.

http://www.nspcc.org.uk/Inform/trainingandconsultancy/consultancy/helpandadvice/value_based_interviewing_wda68727.html

pret-a-Manger

The 'Pret' recruitment process includes an experience day, where applicants will work as part of the team and at the end of the day each team member provides feedback to the hiring manager on how they feel the candidate would be a good fit.

http://www.pret.co.uk/jobs/Recruitment_centre.htm

Section 7: Further information

Useful Links

- *WDWT web pages*
- *Staff Engagement Toolkit*
- *Mindful Employer*

Where else could I get information?

- *http://www.nhsemployers.org/The-Francis-Inquiry/tools/Pages/ValuesandBehaviours.aspx*
- *http://www.cipd.co.uk/pm/peoplemanagement/b/weblog/archive/2013/01/29/how-to-embed-your-company-values-2008-02.aspx;* (accessible to CIPD members only)
- *NHS Employers Values Based Recruitment*
- *Developing engaging leadership*