



# living values

A report  
**encouraging  
boldness** in third  
sector organisations

Geraldine Blake, David Robinson and Matthew Smerdon

Community Links is an innovative inner city charity running community-based projects in east London. Founded in 1977, we now help over 50,000 vulnerable children, young people and adults every year, with most of our work delivered in Newham, one of the poorest areas in Europe. Our successes influence both community-based organisations nationwide and government policy.

## The Purpose:

To generate change. To tackle causes not symptoms, find solutions not palliatives. To recognise that we need to give as well as to receive and to appreciate that those who experience a problem understand it best. To act local but think global, teach but never stop learning. To distinguish between the diversity

that enriches society and the inequalities that diminish it. To grow – but all to build a network not an empire. To be driven by dreams, judged on delivery. To never do things for people but to guide and support, to train and enable, to simply inspire.

# living values

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Geraldine Blake, David Robinson and Matthew Smerdon

# Foreword Changing times, constant values

Esmée Fairbairn Foundation has always been interested in civil society, the values that underpin it and the contribution that charities and other voluntary organisations make to it. This concern flows from a combination of the founder's concern about financial exclusion and his wife's prominent role in some important third sector organisations such as Women's Royal Voluntary Service and Citizens Advice Bureaux.

However times are changing, and many claim that there is a danger that funding constraints and other pressures on the

sector may inhibit its independence, its potential for advocacy and its scope for radical action. There has perhaps never been a better time to investigate what the sector stands for.

The result is this report. We hope that it not only provides a stimulating read and catalyst for debate, but also acts as a helpful tool for organisations in examining their own values and how they can protect, promote and extend them.

**Jeremy Hardie (Chairman)**  
Esmée Fairbairn Foundation

# Our definitions

## What are values?

Values are the beginning – they are what inspire us;  
values are the means – they are what we do and how we do it;  
and values are the end – they are what we strive to achieve.

For example, taking the value  
'transforming lives'

▶ **Beginning** – we are inspired by a desire to change the conditions that diminish our society.

▶▶ **Means** – we work in ways that identify and ask questions about problems and pioneer new ways of solving them.

■ **End** – we do this so as to create a society where our work is not needed.

## What is the third sector?

Deciding what to call the sector is slippery – third, voluntary, voluntary and community, charitable, not-for-profit or non-profit? There are disadvantages in all of these terms, none is able fully to reflect the role organisations play, the contribution they make nor the diversity that exists amongst the organisations that make up the sector. We chose to define the project around the term 'third' sector as the sector of UK society made up of voluntary and community organisations, charities, social enterprises, mutuals and cooperatives.

# Summary

## Why we did this work

It is often claimed that the distinguishing feature of organisations in the third sector is that they are value-driven. But the values of the sector as a whole are rarely defined. Community Links believes values are important. Values shape what the organisation does and the way the organisation does it – how it manages, how decisions are made, the manner in which people work.

The third sector has always existed in the midst of forces that variously shape,

support and threaten its work. Now, more than ever, there are pressures acting on the sector which have the potential to cause a step-change in what the sector does and how it does it. These pressures will be experienced very differently by organisations that are small and large, local and national, those that campaign and those that deliver services. We need to ensure that they do not destroy the very thing that makes the third sector special in the first place – its values.

## What we did

We wanted to investigate:

- ▶ What are the values of the third sector? Are these values shared across the sector?
- ▶ Are these values unique to the sector?
- ▶ Are these values under threat? What are the greatest threats?
- ▶ What can we do to protect these values? What can we do to promote and extend them?

We invited 12 people from a range of organisations (third sector, public and private sectors) to join a Collaborative Inquiry Group to research this issue with us. We undertook research suggested by the Inquiry Group. We developed an approach for interviews and group discussions where participants selected statements from a list and built their own value diagrams, and we collected 59 of these diagrams. We analysed the data and presented interim findings to two seminars involving a further 65 people in making sense of our findings.

## Our Findings



1 There is a set of values that are meaningful to third sector organisations. These are:

- ▶ Empowering people ▶ Pursuing equality ▶ Making voices heard ▶ Transforming lives ▶
- ▶ Being responsible ▶ Finding fulfilment ▶ Doing a good job ▶ Generating public wealth ▶



These values inspire people to work and volunteer in the third sector.



Separately these values are present in the public and private sectors. However, the way in which third sector organisations combine and prioritise these values is unique.



There are forces that have the potential to change the values of the third sector.

The forces that have the potential to change the values of the third sector are:

- ▶ The nature of the relationship between government and the sector which is characterised by:
  - a top down approach
  - targets and outputs set by the centre
  - short termism
  - scepticism over involving those outside government in the design of services
- ▶ The nature of the funding environment which is characterised by:
  - increased use of contracts
  - decreased use of grant funding
  - lack of funding for what you want to do in the way you want to do it



The organisations that navigate these forces successfully are those that passionately focus on their values.



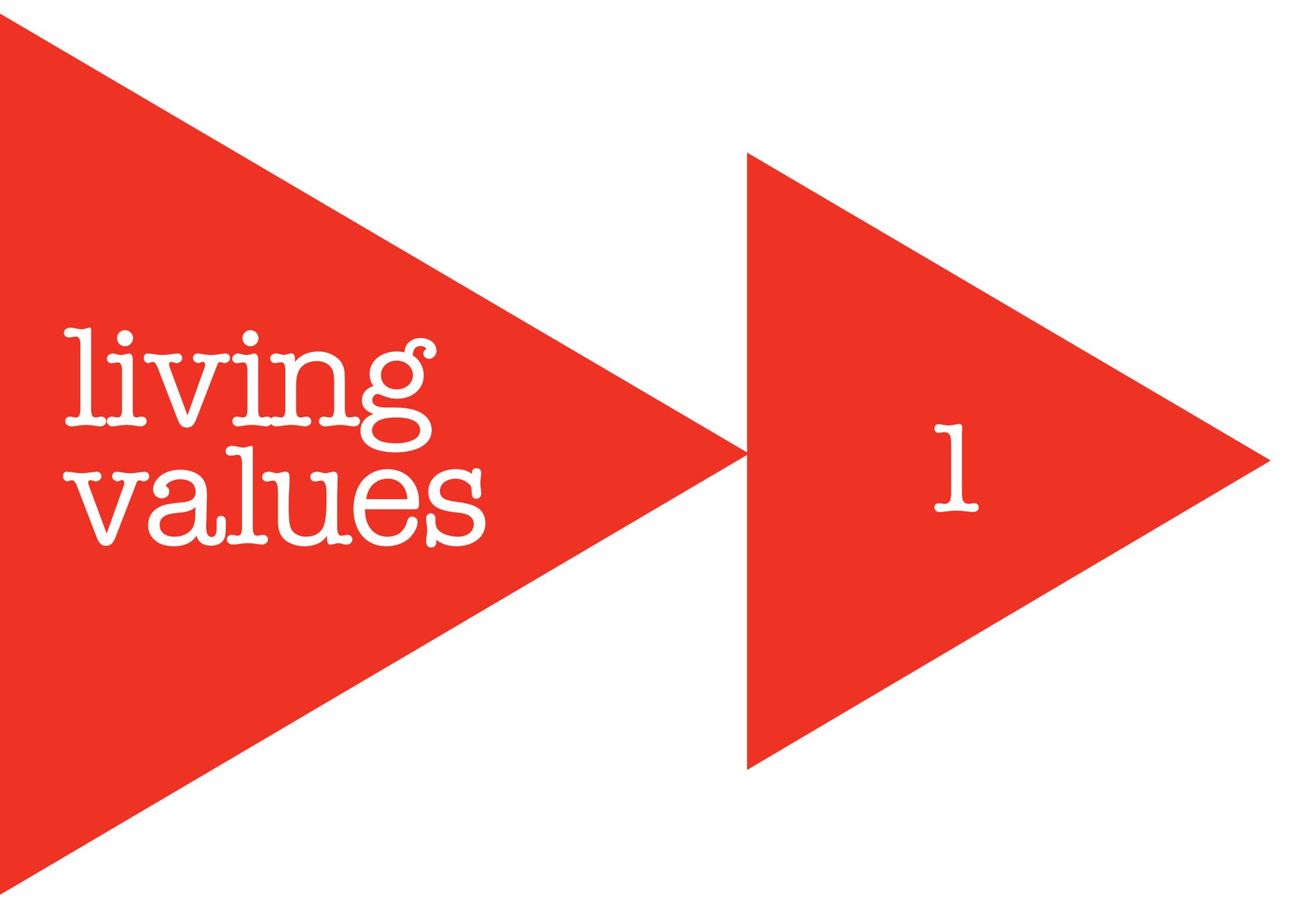
The biggest threat to the sector comes from within. It lies in organisations:

- ▶ Not focusing clearly on values
- ▶ Chasing funding that does not fit values
- ▶ Allowing values to be influenced by others outside the sector
- ▶ Allowing the demands of running an organisation to overshadow values



There are practical things that third sector organisations, and those that support them, can do to put values at the centre of every activity.

**Values are the beginning, the means and the end.**



living  
values

1

# Living values



**Why we did this work:** Organisations display their values prominently on the website and in the Annual Report. Consultants and academics write about

values. Trainers discuss them at away days. In the world of the busy voluntary agency struggling to develop and deliver effective services in a challenging

environment, do our values help us? Do they matter? We believe they do, now more than ever.

## Here's why:

Many of the functions and characteristics of the state that we as a country can be most proud of began life as ideas outside government. Universal suffrage, universal education, social insurance, free health services, social housing are all the product of groups and individuals standing up for an ideal and then promoting it often in the face of official indifference, if not active resistance. They were standing in what we now call the third sector.

In recent years the nature of the activity has become more diverse. Concepts such as civil society, social justice, global activism and single issue campaigns have entered the vocabulary and activities as diverse as delivering residential care for older people, wearing a white wristband, volunteering to read with children in school and working to promote fair trade all fall into the third sector. Whilst there may be little else that they all have in common, values are a golden thread

which run through all this activity. Indeed it might be more useful to describe this sector not by what it isn't as we sometimes do – 'not for profit' or by what's left when we have defined everything else – 'third sector' but by what it is and what it does – 'for values'.

Whilst the sector has been growing and diversifying the rest of the world has not stood still. 'For profits' increasingly recognise the attractions of a value based



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Our Inquiry noted with much anxiety the spread of the 'animal farm syndrome' as voluntary agencies grow and change to look more and more like the statutory departments whose functions they hope to inherit.

approach. For some this is a corporate social responsibility spin but we live in an age of ever increasing transparency and many now recognise that values with real substance are not a marketing gimmick but both a moral and pragmatic business imperative. At the same time, and for quite different reasons, government has been experimenting with different models of service delivery and has been particularly enthusiastic about the third sector role. The combination of these trends has led to a blurring at the edges. Social enterprises, community interest companies and even housing associations now join traditional registered charities in vigorous competition as they bid to deliver services once delivered exclusively

by the state or perhaps in partnership with business.

Meanwhile foundation hospitals with their freedom to fundraise and, even, potentially, schools under the current white paper proposals are beginning to stake out new third sector territory remote from the traditional charity but also some distance from the clear conventional statutory service model.

The ground has become more crowded not least because there are now rich pickings available for the entrepreneurial agency that is ready and willing to respond to the government's agenda and, if rhetoric from both government

and opposition is to be believed, we are about to enter a period of ever greater opportunity. This will challenge our understanding of our role and purpose at least as fundamentally as any of the external changes that we have already encountered.

It isn't just the availability of the statutory funding but also the terms that are changing. Most are directly connected to the delivery of mainstream public services. Much of the balance is linked to this as the ultimate, if not the immediate, objective. Recent initiatives, Future Builders, Change Up and now Capacity Builders, helping to develop capacity and infrastructure



Change can create paradox and unintended consequences. It is at precisely such a time that we need to revisit our values.

for organisations have grown out of government's interest in the third sector's potential to deliver public services. David Miliband, as Minister of Communities and Local Government, told the annual NCVO conference that "small organisations live a more perilous existence. We must find a way of supporting organisations whose value to society cannot be easily measured by targets or defined in contracts". But there is little evidence on the ground that government really understands the benefits which can be derived from working with the sector and which go well beyond efficient and effective delivery of government services.

This matters now, and will matter more in the forthcoming period of expansion, not only because we, as a society, are missing the opportunity of a far more productive partnership but also because, ironically, government's very support for the public service delivery objective threatens to undermine the other potential benefits. Our Inquiry noted with much anxiety the spread of the "animal farm syndrome" as voluntary agencies grow and change to look more and more like the statutory departments whose functions they hope to inherit. In itself we do not believe statutory contracts are a bad thing and we did not begin this work on values with any subjective judgements about those who

have chosen to follow that path. We are however worried about the implications of the terms of these contracts and about the options and opportunities which remain for those with an alternative vision. There is not for instance any equivalent of the Future Builders programme for those who operate outside a quite specific definition of public sector delivery although formerly, admittedly more limited, Home Office funds would have been available for a much broader definition of a voluntary sector activity. There is a risk that, in following our enthusiasm for the big public sector contract, third sector organisations will become co-conspirators with government in destroying the very

**There is little evidence on the ground that government understands the benefits which can be derived from working with the sector and which go well beyond efficient and effective delivery of government services.**



Objectives and work programmes can be dynamic, learn lessons, improve over time, but values are unconditional.

We may not know exactly what challenges we will face tomorrow but we should know exactly what inspires us, how we will behave and what we are trying to achieve.

attributes of the sector which, we are both agreed, were precisely the reasons for embarking on this expansionary course in the first place.

All this leads us to believe that this is a time of both opportunity and threat. Rapid growth means rapid change. Change can create paradox and unintended consequences. It is at precisely such a time that we need to revisit our values. We believe that objectives and work programmes can, indeed should, be dynamic, learning lessons, improving over time but that values are unconditional. We may not know exactly what challenges we will face tomorrow but we should know

exactly what inspires us, how we will behave and what we are trying to achieve.

If the sector is about something more than being “third” or “not for profit” we need to define it in terms other than where it sits next to government and business or its relationship to money. Values are the key.

### What we did

We wanted to develop our thinking on values with others, and therefore chose to work collaboratively. We recruited a group of 12 people who were selected for their relevant skills, experiences and expertise rather than identified as representative of a particular type of organisation.

We embarked upon this Collaborative Inquiry because we think it is now more necessary than ever to define what is special about the sector and also, and this is the difficult bit, because we think we have to get beyond the vague assertion that our values are “different”.



If the third sector is about something more than ‘not for profit’ we need to define it in terms other than its relationship to money. Values are the key.

This is essential if we are to control and plan our own destinies. It will also become important to government in dealing with those who might not unreasonably suggest that other types of organisations could deliver statutory services equally competently.

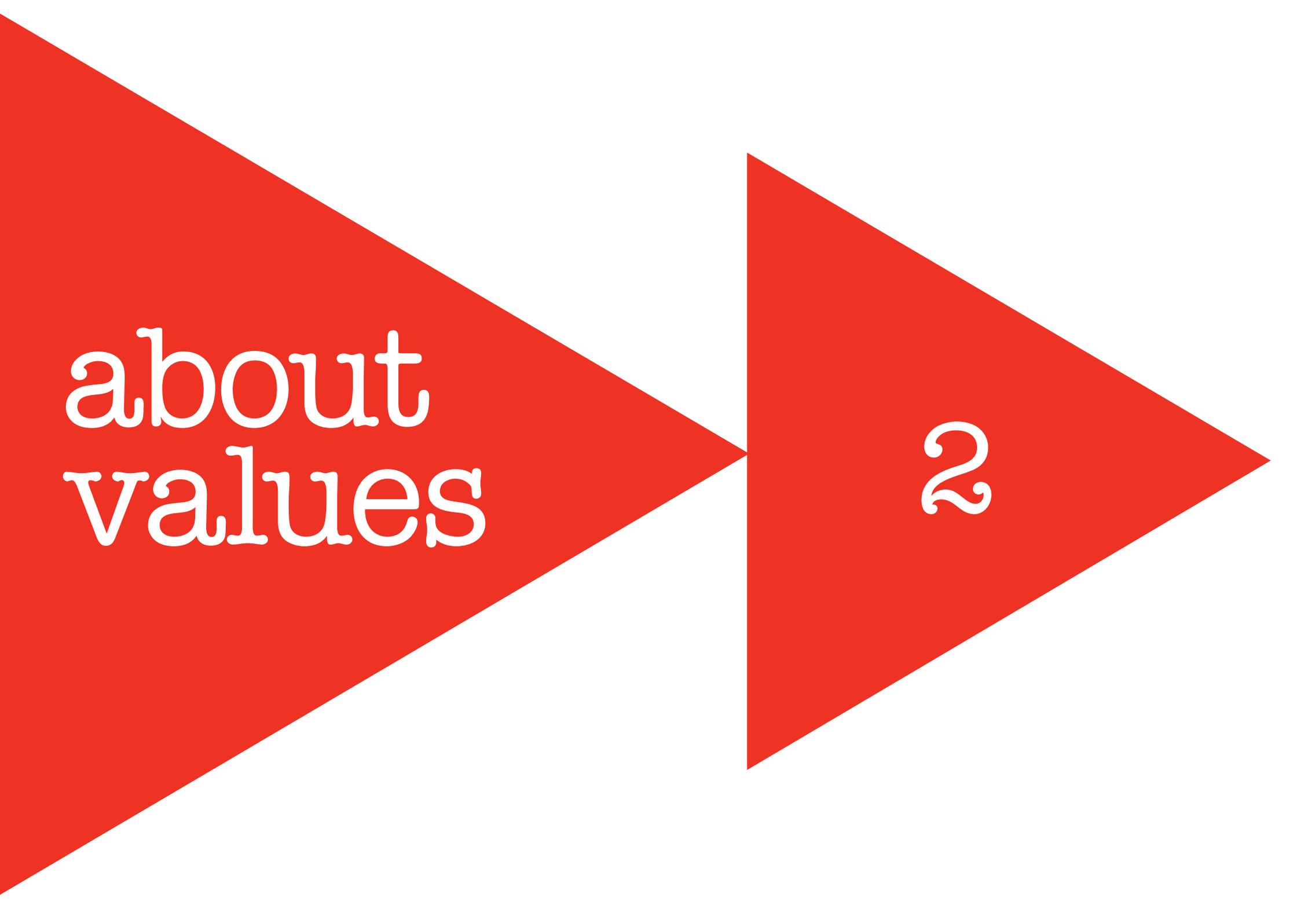
If it is our values that make us special, we need to be capable of explaining and interrogating them. Are our claims actually substantiated by the work that we do and the way that we do it? Are the values, as we believe, in danger of dilution and does it matter if they are? Indeed are we hanging on to an old fashioned idea that our work is rooted in these principles when in fact we have

drifted far from these beginnings and a typical voluntary agency is now no more or less likely to be value driven than a public or private one? Might we then go on to make some judgements about the influences that are shaping our values today and about how can we use this knowledge to help us mould, rather than be moulded by, the forces of change?

Amongst our own organisational values at Community Links we aspire to ‘teach but never stop learning.’ We established the Collaborative Inquiry with colleagues in the sector and friends from other fields to try to answer these questions. Our report is accompanied by materials which we hope will enable

others to think more clearly about these issues, to identify their own priorities, to understand and to influence, not to be driven by, forces around them and so to contribute to the development of a diverse and dynamic sector delivering and challenging, serving and innovating, comforting and disturbing. It is the values underpinning the third sector which equip it to achieve these objectives effectively and distinctively.

**We think we have to get beyond the vague assertion that our values are ‘different’. This is essential if we are to control and plan our own destinies.**



about  
values

2

# About values

There is a set of values that is meaningful to third sector organisations



We wanted to find out what the values of the third sector are and to investigate whether these values are shared across the sector. To help people explore the values of third sector organisations we devised an exercise, reproduced in section six, that asked people to choose

and prioritise a list of statements about the sector that reflect values. Strong themes emerged, which enabled us to put in priority order what inspired organisations to do the work they do, how these values determine what organisations do and the methods

they use, and how values express what organisations are striving to achieve. We recognise that not all third sector organisations will share all of these values but believe that they will be meaningful to many.

“Values drive every bit of work we do”

Third sector interviewee

“Values help to enshrine our collective purpose”

Third sector interviewee

“People dedicate their lives, you can’t underestimate the power of this”

Third sector interviewee

# There is a set of values that are meaningful to third sector organisations

## Empowering people

- ▶ We are inspired by the desire to increase people's control over the decisions that affect their lives.
- ▶▶ We work in ways that encourage initiative, self-help and mutual help and foster action that is led at all times by the reality of people's needs and not the needs of those in charge of resources. The full participation of people who experience needs is fundamental and obligatory.
- We do this so that everyone can play the part they want to in society.

"(This) work is a huge opportunity for affirming the fact that people have resources – (it is about) finding ways to liberate those resources for people to achieve their goals."

Third sector interviewee

"I want to help people achieve their goals. I feel good when I see the outcome, because with people you can see it in their eyes."

Third sector interviewee

## Pursuing equality

- ▶ We are inspired by the desire to ensure everyone has equal opportunity to achieve their potential.
- ▶▶ We work in ways that respect people, reduce isolation and treat people fairly.
- We do this to bring about a society where the dignity and equal worth of all is recognised.

"It's WHY we're in this game – to work exclusively for the rights and benefits of people who the system is chewing up."

Third sector interviewee

"[This is] a place where I can champion the cause of people being overlooked. I have the freedom to do something differently, the ability to speak out, to say things that are not acceptable in the statutory sector for fear of sanction by superiors, to recruit people skilled in enquiring, enterprising approaches who have a shared understanding of why we're in this game."

Third sector interviewee

## Making voices heard

- ▶ We are inspired by the desire to support people to make their voices heard.
- ▶▶ We work in ways that encourage people to advocate for themselves and we capture the lessons from individual cases to tackle the reasons why people have to stand up for themselves in the first place.
- We do this so that people can represent their interests, secure their rights and access the services they need.

"The sector advocates effectively on behalf of people experiencing high levels of disadvantage. At its best, it focuses on the totality of someone's experience and actually joins things up."

Public sector interviewee

"Those in power recognise that activity outside parliament is what drives them."

Third sector interviewee

## Transforming lives

- ▶ We are inspired by the desire to change the conditions that diminish our society.
- ▶▶ We work in ways that identify and ask questions about problems and pioneer new ways of solving them.
- We do this so as to create a society where our work is not needed.

"I want to change the world, tackle poverty, reduce inequality, make a fairer world where everybody has the same right to lead a decent life. I felt I could be most effective in the third sector."

Third sector interviewee

## Being responsible

- ▶ We are inspired by the way accountability is exercised and expressed in the sector.
- ▶▶ Our organisations are governed by volunteers, committed to the delivery of purpose in ways that meet regulatory expectations and in ways that bring to life the values expressed here.
- We do this so as to balance the needs and interests of all those affected by our work. This gives our work legitimacy.

“You are so close to the challenge or the experience that you have to be creative and solution focused – but you are also truly accountable as the people using your services are in your face all day.”

Inquiry group member

“Our services are developed as a response to experience and delivered by those with that experience.”

Inquiry group member

## Finding fulfilment

- ▶ We are inspired by the opportunity to be part of a moral community.
- ▶▶ We work in ways that feel different than other sectors stimulating our creativity, fuelling our passion and driving our purpose.
- We do this to enjoy the freedom to associate with people who share a commitment to these values.

“There is definitely something striking in the knowledge that you are contributing to making a tangible social difference. Knowing that your career contributes to dynamic social change is addictive in its own unique way. Working with like-minded people driven by the same values makes a job much more than just a job.”

Third sector interviewee

## Doing a good job

- ▶ We are inspired by dreams, and judged on delivery.
- ▶▶ So we carry out work that brings our values to life and find ways to prove this to those we work with and those that support our work.
- This gives our work credibility and legitimacy.

“Look at the Fair Trade movement in the UK. They have achieved a miracle. They’ve moved from the wooden table outside the church into Tesco. You wouldn’t be able to do that without innovation, drive, foresight, courage, and resilience.”

Third sector interviewee

“A Local Authority is not short of ideas, but the third sector has experience to inform these ideas, a wealth of good practice and links to groups that councils find it hard to reach.”

Public sector interviewee

## Generating public wealth

- ▶ We are inspired by the way our work generates wealth for many not profit for a few.
- ▶▶ We work in ways that encourage enterprise
- We seek to generate surplus all to re-invest in activities that bring our values to life.

“The sector has an opportunity to create an alternative framework about social not financial gain – this is a powerful model which will lead to unique outcomes.”

Third sector interviewee

Separately these values are not unique to the third sector; it is in their unity that their uniqueness is created.



Separately these values are not unique to the third sector; it is in their unity that their uniqueness is created.

The values most often identified as unique were making voices heard, empowering people and being responsible.

We were keen to explore to what extent these values are seen as unique. Are these values found in other types of organisation in other sectors? How is the third sector different from businesses that work in a socially responsible way or public sector agencies that deliver important services, and how do we demonstrate this?

The values that most interviewees identified as unique were making voices heard, empowering people and being responsible although the numbers choosing a single value as unique were small suggesting a belief that, taken individually, these values are present in other sectors.

“There are absolutely no values that are unique to the voluntary sector and nor should there be. The idea that no commercial organisation has moral values is contrary to my observation (let alone government which is often deeply moralistic at every level). I want more variety, more diversity, the more the better. Diversity is what we have to offer.”  
Third sector interviewee

“The sector does not do itself any favours by trying to occupy the moral high ground. Some businesses have excellent values. Public services have dignity and value. People still work in them for a reason.”  
Third sector interviewee

However there was a strong sense that the way in which these values are combined within third sector organisations is unique. Whilst the values in this list reflect a range of inspirations, methods and aims, it is in their unity that their uniqueness is created.



In order to live up to live up to the sentiments expressed under one of these values, organisations have inherently to live up to the principles set out in the others.

“‘To empower people’ combined with ‘to be led by people who experience problems’ is unique. A school does the first one, but not using the approach captured in the second statement.”  
Public sector interviewee

Significantly, in order to live up to the sentiments expressed under one of these values, then organisations have inherently to live up the principles set out in the others. For example ‘empowering people’ cannot happen without ‘pursuing equality’ which in turn requires ‘making voices heard’ and ‘transforming lives’ and so on. So these values form an inseparable whole and

in their practical delivery one value becomes the expression of another.

“We exist because of the will of the people involved, not because of the will of the government or commercial imperatives.”  
Third sector interviewee

“Caring for people is not unique but giving time voluntarily to do so is.”  
Public sector interviewee

**These values form an inseparable whole and in their practical delivery one value becomes the expression of another.**



## People are inspired to work in the sector because of these values

Having the freedom to explore new issues and new ways of working without necessarily having to operate in formal hierarchies was highly valued.

These values inspire people and motivate them to work in the sector. This is an obvious finding. But it is also an important finding because if the sector is to continue to inspire people to get involved both as volunteers and as paid workers, then it has to be able to rigorously and passionately demonstrate these values. Values are the sector's most important asset in recruiting people and sustaining their commitment.

Another reason why people choose to work in the sector is a sense that the sector has distinct ways of working that people cherish. These include having the independence to act and the freedom to

do things differently, to speak up and to make things happen. People talked of the sense of creativity and energy and the ability to feel connected to people and establish long term relationships with them. Having the freedom to explore new issues and new ways of working without necessarily having to operate in formal hierarchies was highly valued. A fundamental part of the enthusiasm for working in the sector was that activity is oriented away from individual gain.

“The third sector isn't a perfect employer. Workloads can be high and financial rewards low yet it seems that once in, it's hard to leave – for all the right reasons.”

Third sector interviewee

“I worked in the statutory sector and clients were ordered to work with me. I wanted to test out working where people chose to work with me. There are more opportunities for creativity and you feel you get a better response and a more equal relationship.”

Third sector interviewee



Values and the ways in which the sector works are highly cherished by people active in the sector. These must be preserved, celebrated and promoted.

“In all my career I’ve been concerned with public benefit rather than private gain but I moved from the public sector to the third sector because of the greater independence and flexibility and the greater chance of making things happen.”

Third sector interviewee

“I joined the sector as a teenage volunteer so as to contribute to my community ... at that time I felt I could help other young people making the mistakes I made to avoid other mistakes. In the third sector I was encouraged to express myself and come up with original ideas

and this was an opportunity to build confidence. I like to think this has stayed with me.”

Third sector interviewee

“I am more driven to work hard because I know that my hours are not going into making profit for a board of shareholders. The hard work is ultimately to change the area I live in.”

Third sector interviewee

“I like the basic integrity of the sector and I like working from the ground up.”

Third sector interviewee

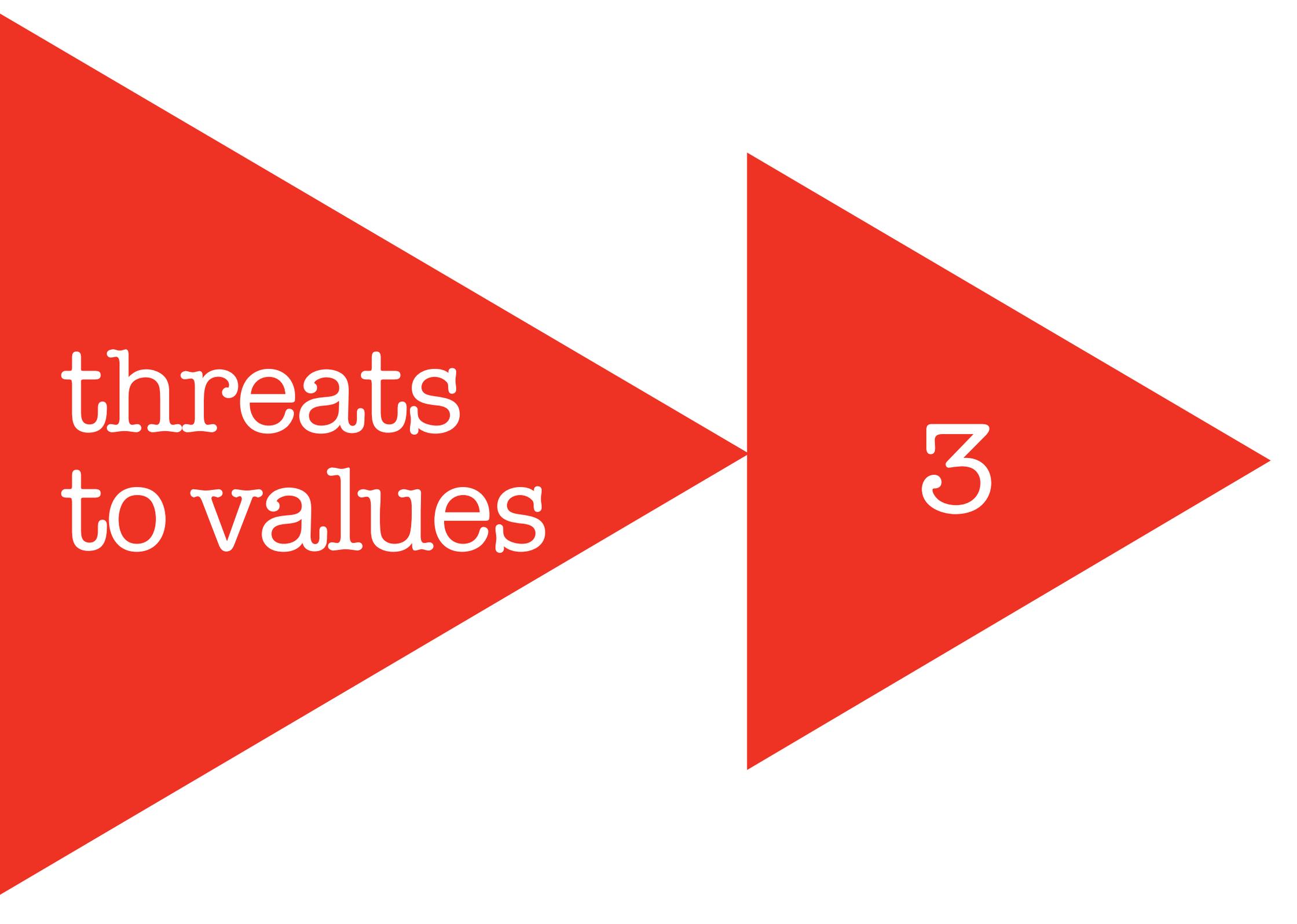


## Conclusion

There is a set of values that are meaningful to people working in third sector organisations.

Separately, these values are present in other sectors, but the distinctive way in which values are combined within third sector organisations is unique.

Values and the ways in which the sector works are highly cherished by people active in the sector. These must be preserved, celebrated and promoted in order to continue to inspire people to commit their time and energy.



threats  
to values

3

# Threats to values There are a range of forces that can change these values



Whilst the uniqueness of the third sector derives from the way it combines and prioritises values, there was concern expressed that some values on their own are particularly under threat. Interestingly, of the three values

that interviewees identified as most individually unique, (empowering people, making voices heard and being responsible), making voices heard and being responsible were also identified as being the two values most under threat.

We asked interviewees to talk about the forces acting on the sector that have the potential to change values.

## The nature of the relationship between the third sector and government

The nature of the relationship with the different branches of government was given by far the greatest significance.

“There is no question that the third sector is seen by government as a better way of delivering some public services than public or private institutions. And

here a real methodological difficulty arises based on the financial structure of voluntary organisations – the whole point of getting voluntary organisations to deliver services is the difference or value added they bring, but you can’t get this into a tender. What voluntary organisations most add is the least measurable. If the sector just becomes an agent it loses the very thing government is contracting with it for.”

Public sector interviewee

Whilst interviewees revealed a wide variety of relationships and experiences, a set of characteristics did emerge that dominate and dictate the nature of the relationship the sector has with government. These issues are widely discussed in the sector, but it is interesting here to see how interviewees related these well rehearsed concerns specifically to values.



Organising the activity of the third sector around the commissioning and purchasing of services means the relationship becomes characterised by prescription and targets set by central government departments.

## A top-down approach

There was a sense amongst interviewees that public sector decision makers, policy makers, and staff in the private sector that are working with third sector organisations, conceive of problems in ways that do not fit with the realities that third sector organisations encounter.

“One threat to values is operating in a world where central government is so prescriptive about what it wants. We will say ‘here are the needs of the community’ and the Local Authority will say ‘yes we know, but this is what we’ve been told to spend our money on.’”  
Third sector interviewee.

“It used to be that we said, ‘This is what we need to do.’ Increasingly, people are being told, ‘This is what we want you to do.’”  
Third sector interviewee

## Targets and outputs set by the centre

Organising the activity of the third sector around the commissioning and purchasing of services means the relationship becomes characterised by prescription and targets set by central government departments, with little room to manoeuvre or to respond to local realities. Programmes are shaped by the demands of the public sector

environment as opposed to direct experience, and by the administrative needs of centralised bureaucracies as opposed to the needs third sector organisations and the people they seek to support.

“The government drive to quantify, measure, to push towards public service delivery ... can make people lose sight of what they are trying to achieve. You end up trying to achieve targets and not achieve change for the people you are working with.”  
Third sector interviewee.

“We have to meet certain targets, and only work with certain people ... the effect on our values is we have to operate a means test, and two levels of provision are developing, this is against our values really ... I find myself asking during the day ‘how many people have we got in who are ‘eligible’. I feel like it’s taking over ... If we write a letter, that takes an hour, so those in the ‘not eligible’ category get a phone call, because that only takes 10 minutes.”  
Third sector interviewee\*

Quotations marked with a \* are taken from Mike Aiken, 2002, ‘Managing Values: The reproduction of organisational values in social economy organisations’. PhD thesis, Open University.



Public sector agencies are invariably focused on achieving short-term goals. In a context of externally driven goals and a short time to deliver them values can be subsumed.

### Short termism

Public sector agencies are invariably focused on achieving short-term goals. In a context of externally driven goals and a short time to deliver them values can be subsumed.

“The widespread short-term nature of government policy ... forces you to compromise values that are crucial to sustainable long-term impact.”

Third sector interviewee.

“The danger is, no matter what the government’s good intentions, there’s got to be a realisation that the majority of the time some of the key overall objectives/values are being forced to be

compromised at the expense of short-term targets/outputs.”

Third sector interviewee

“The government needs to have more of a long-term strategy enabling the third sector to really bring about lasting change for the years to come. For instance, a private investor would expect a business he was investing in to show the real fruits coming in a realistic period of 5-10 years, but we are often expected to show a fully comprehensive outcome within 1-2 years. The sector is forced to focus so much on providing short-term results that it may neglect the long term objectives of providing lasting change.”

Third sector interviewee

### Scepticism in government over involving those outside in the design of services

The government has put significant emphasis in its rhetoric on the importance of listening to communities. However, the feeling amongst interviewees is that involvement rarely goes beyond cursory consultation.

“Government policy makers don’t listen carefully enough to groups. (Programmes) are just not effective, because of inadequate consultation.”

Third sector interviewee

### The nature of the funding environment

#### Increasing use of contracts for services

The increasing role of contracts in place of traditional grant support brings many potential challenges for values. An approach which sees public services as ‘products’ leads to policies, programmes and targets that may make sense in theory, but may not match up with realities as they are experienced by third sector organisations. A good three-year contract should be preferable to a one year grant, but experience shows that



A good three-year contract should be preferable to a one year grant, but experience shows that third sector organisations are making compromises to secure these contracts against competition from other providers.

third sector organisations are making compromises to secure these contracts against competition from other providers.

“The rise in contract culture / service delivery provides an opportunity to secure income but can lead organisations away from being led by needs to being led by the government’s agenda.”

Third sector interviewee

“The contract mentality threatens the community development approach, innovation and risk taking.”

Third sector interviewee

“A Law Centre that challenges a Local Authority might find that its LA funding gets cut, and it won’t be funded to criticise.”

Public sector interviewee

### A decrease in grant funding

The increased use of contracts is mainly an issue for larger voluntary organisations – smaller community groups may be unable to compete at this level but have fewer sources of grant funding now available to them. A member survey carried out by bassac in December 2005 found that ‘Grants and other investments from

local authorities and other statutory agencies – which enable community-based organisations to design a wide range of local services to meet a wide ranging local needs – are being replaced by a system of competitive tendering. Of the 55 members interviewed, 58% said funders had reduced the number of grants used to support community-led activities in the last three years. Of these, 56% had seen grants replaced by commissions, contracts and service level agreements. Of those members to have seen a decline in grant funding, 73% said it was making it harder for them to be sustainable.’

“The pressure from contracting and commissioning is a tension which the sector can live with but funding channelled into commissioning is not the same as grants like the GLC (Greater London Council) used to give which were open to all, had more flexibility and less focus on the agenda and priorities of the commissioner.”

Public sector interviewee



Frustrations were voiced about issues that compromise values such as the lack of core funding, funding being for short term 'quick fixes' and funding programmes issued with short notice to submit applications.

## Not being able to attract funding for what you want to do in the way you want to do it

Familiar frustrations were voiced about issues that compromise values such as the lack of core funding, funding being for short term 'quick fixes' and funding programmes issued with short notice to submit applications which makes collaboration and joint application difficult.

"This organisation has had to move away from a holistic approach to get funding. The statutory sector not understanding full cost recovery and joined-up thinking makes it easier to get small simple projects funded than projects that really meet complex needs."

Third sector interviewee

"Funders keep wanting us to come up with new and innovative projects when we know that what we do works."

Third sector interviewee

"The danger that we often feel is that we are becoming less proactive about what we think is important and more

reactive to what the government wants to promote."

Third sector interviewee

## The way the sector responds to these forces is what decides the fate of its values.

At the start of the collaborative inquiry there was anxiety that the third sector was simply at the mercy of these forces. They are driven by the public and private sectors with greater resources and by wider political, social, environmental, economic issues that are outside the sector's control. In fact, the findings strongly challenged this assumption. It became clear that

what happens to values in the face of these forces is dependent on how the sector responds. The biggest threat to values comes from the sector not taking responsibility for making values live.

"Values are under threat from the sector itself because the voluntary sector is choosing to devote its energies to core public service delivery and income generation through trade. It's choosing to do this for survival and the opportunity to get bigger for its own sake and the more it's driven by contractual requirements and bottom lines, the less freedom it will have to tackle the problems that diminish society".

Third sector interviewee



Many third sector organisations operate in survival mode, and this can have a significant influence over strategic decisions.

### Not focusing on values

Interviewees warned of the dangers of not ensuring that values are identified and understood by everyone in the organisation (users, volunteers, paid staff, trustees). This is especially relevant when an organisation is growing quickly or introducing more formal systems and procedures. Interviewees talked about the dangers of organisations claiming to act in a certain way but not following this through, or, of not repeatedly asking themselves the question ‘What do we say we do that we don’t really do?’

“You have to work at embedding values and not just assume they are being absorbed. Innovation, drive, excellent management and foresight help successful organisations to create the future.”

Third sector interviewee

“Scale is (a) difficulty. We are recruiting people from all sorts of backgrounds, for their skills. We are no longer a band of brothers and sisters. So this is a challenge. We can’t expect people to come into the organisation with a ready made set of values. Thus the difficulty is in instilling our values in new staff – because there are so many new staff.”

Third sector interviewee

“There was never a day when the (major public sector funder) said we’re going to offer you 40 per cent of your income and change the way you are ... it has happened very very gradually.”

Third sector interviewee\*

### Going after funding that does not fit with your values

It is dangerous when organisations are tempted by new funding that steers the organisation away from its values. There may be reasons for being tempted, for instance to protect organisational and job security – few people would feel they had done a good job, or that their careers would be enhanced, if their organisation had to close for lack of funding. Many third sector organisations operate in survival mode, and this can have a significant influence over strategic decisions. However, interviewees felt that organisations had to be much



## The danger is being resource-led and not needs-led, and the challenge is how to be needs-led in a resource-led environment.

more aware of the impact of these decisions on values, and be prepared to turn down funding if necessary and face the consequences. This goes as far as potential legal implications for organisations that take on the delivery of services that are not consistent with their charitable objectives.

Interviewees also commented on the delicate balance required if one is to accept funding on terms that make it more difficult to stay true to values: short-term funding, output targets set by somebody else, very little lead-in time for bids which makes it impossible to collaborate with other organisations, very little time between being awarded

a contract and having to begin delivery and burdensome reporting requirements.

The danger is being resource-led and not needs-led, and the challenge is how to be needs-led in a resource-led environment.

“We often find ourselves chasing funding which allows you to do a third of what you set out to do and losing the campaigning bit of the work ... It takes a lot of single-mindedness and energy to stand up and say we’re not about that. It requires commitment and organisation. When you are in survival mode staying true to your principles is difficult.”

Third sector interviewee

“There are of course the ‘official values’. If we do some work we have to do a plan and we have to say how it fits the values. This isn’t hard to do ... but the day-to-day work is not necessarily the same thing ... a key change has been in the ... day-to-day tasks (of) managing (government) contracts. It is quite tough meeting the targets they set. Sometimes I think – what are we actually doing?”

Third sector interviewee\*

“We are still – though we have reasonable reputation – not independent in terms of funding. Sometimes getting funding takes you away from research and lobbying and consultation. The funding

issue is the one that makes it difficult to keep focusing on the values.”

Third sector interviewee

“It is quite invidious because you do start to fill in the boxes and you suddenly find the whole process has snuck up on you and bit by bit you have actually moved in that direction almost without being aware of it ... a lot of it seems quite harmless at the time ... and then gradually you realise that you have filled in 20 pages of boxes. The whole thing grows ... then you realise that you have gone down that road.”

Third sector interviewee\*



Values can be influenced if organisations compromise their independence. Organisations have to work hard to protect the freedoms they need to deliver their values.

“My job has changed over the last two years. I’m now a contract manager. Before you had much more freedom to pursue initiatives, to help set up projects, to do research initiatives ... We have a regional policy forum that seeks to develop campaigning, I don’t go to it ... there just isn’t time for me to do that.”  
Third sector interviewee\*

### Allowing values to be influenced by others outside the sector

Values can be influenced if organisations compromise their independence. Organisations have to work hard to protect the freedoms they need to deliver their values: freedom to set values and

priorities on their own experience and vision, freedom to deliver the stated purpose of the organisation, freedom to negotiate robustly with funders and freedom to engage in public debate. Again, interviewees were resolute that organisations themselves are responsible for this.

“In relation to values, the sector does not use its power base, it’s incredible to think about the scale – number of people, number of organisations – but government can click its fingers and we will run in that direction given the intense financial anxiety.”  
Third sector interviewee

“Sometimes the third sector is just a tool to enforce government policy rather than challenge it.”  
Third sector interviewee

“The organisations that get the money are often the ones that do the government’s bidding rather than the ones that do good.”  
Third sector interviewee

“The Local Strategic Partnership creates a set of rules for its environment, which is a kind of co-option... Dissent is more difficult to express. The community is obliged to express itself in ways alien to its own natural voice.”  
Third sector interviewee

### Allowing the demands of running a third sector organisation to overshadow values

Interviewees were not unrealistic about how difficult it is to work in third sector organisations. The pressures of operational management in the context of tight budgets, demanding working conditions and distressing issues potentially challenge values on a daily basis.



The greatest challenge is to choose the right way to respond. Third sector organisations do have a choice and they must use it.

“It’s incredibly hard to run this organisation, it’s such a struggle to juggle as many balls, having to know everything about finance, hr, government policy, the way funding works, and to try to hold on to values when operational pressures are in your face.”

Third sector interviewee

But, there is a balance to be struck.

“A big challenge to values is getting comfortable – it makes it more difficult to take risks.”

Third sector interviewee

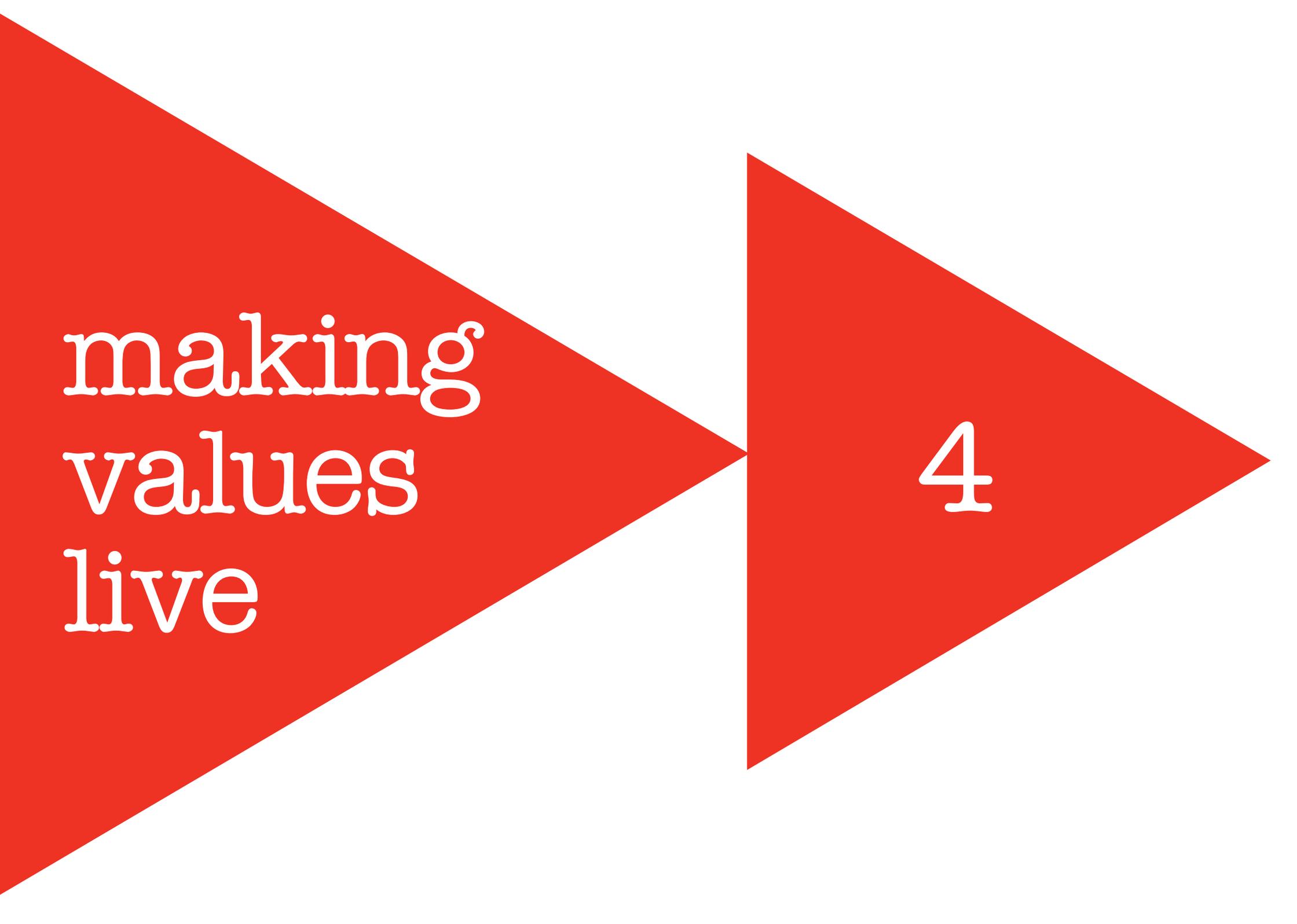


## Conclusion

The way the sector responds to the forces acting on it will determine what happens to its values. This is a challenging finding because it places the responsibility for maintaining values firmly in the hands of the sector. It is also deeply encouraging because it says that there is something the sector can do about it. We are not at the mercy of these forces. Of course, the sector’s partners can play an important role in helping to create an environment in which the sector’s skills flourish for the benefit of society, but the sector should not feel that it is dependent on others to make this happen. This conclusion, in

turn, is deeply inspiring because it sets up the challenge not just to maintain values, but also to take responsibility for significantly extending them.

The contexts that organisations are working within present them with challenges. The greatest challenge is to choose the right way to respond. Third sector organisations do have a choice and they must use it.



making  
values  
live

4

# Making values live

## Organisations that navigate these forces focus on their values



The assumption that the sector's values are at the mercy of forces outside its control was strongly disputed by interviewees' responses. There are practical things that those who support the sector can do to help put values at the centre of every activity. However, organisations felt that we have to take responsibility for making our values live. No-one else will do it for us. We found this an inspiring and optimistic finding.

- ▶ **Talk about values** – agreeing the values of the organisations is like laying the foundations of a building. You can't change the foundations without demolishing the building. Similarly you cannot change the values of an organisation without destroying its integrity. But values must be constantly referred to and kept in the front of the minds of everyone connected to the organisation.

The organisations involved in this research enthusiastically described the ways in which they use their values in practical ways and do not just file them away. This section summarises what interviewees offered in terms of advice, ideas, case studies, information, resources and hopefully inspiration that will help organisations to explore how to put values at the centre of all that they do.

- ▶▶ **Build every activity on your values** – putting the values of the organisation into practice requires every part of the organisation to think about what values mean for how people behave, how ideas are formed and how work is planned and delivered.

In this report, we have argued that values are the beginning, the means and the end. In order to put this into practice, organisations need to bring values to life in each of these stages, and to do this forcefully and passionately.

- **Measure your work against your values** – delivering the values of the organisation requires work on measuring whether and how this is being achieved. If an organisation is doing all three of these, each stage reinforces and enhances the quality of the others.



Everyone in the organisation has to be involved – users, volunteers, paid staff and trustees in developing strategy and plans that are explicitly driven by your values.

### The beginning. Talk about your values

- ▶ Ensure that everyone knows what the values of the organisation are and that people talk about them and review their work against them. Everyone in the organisation has to be involved – users, volunteers, paid staff and trustees

in developing strategy and plans that are explicitly driven by your values. It's important to use your own language. Do not just rest on the assumption that because you're a charity you are inherently good.

“(Involve) your beneficiaries, (stay) in touch with grass roots. This has to be done quite deliberately. It's about keeping your own flame burning and then being quite systematic about revisiting the values and making sure that they are underpinning what you are doing. That is much more important than regulation and funding. Then, making sure your plans are consistent with your values and the way you are trying to run the organisation. Don't allow yourself to get distorted by government or other people's priorities. Keep revisiting your mission. Each individual organisation has to do this for itself.”

Third sector interviewee

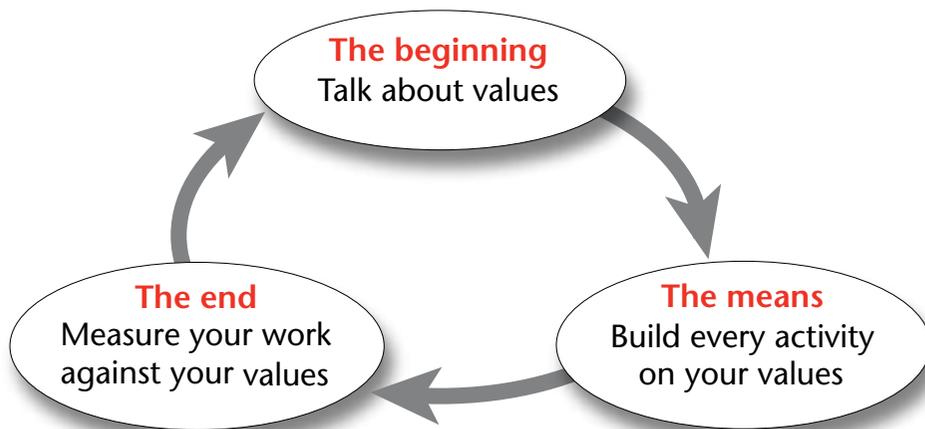
“Does everyone in the organisation understand the values? Well, there may be 2 points of contention – that are language things – it's whether the organisation transforms people's lives or whether we help people to transform their own lives. We can slip into 'we turn people around' rather than 'we help people to turn themselves round because we respect their power to transform their own lives.’”

Third sector interviewee

“(Our) values are understood, although I suspect that some values are more controversial than others, and would stimulate debate. Not because they are not common values but because they are complex ones. The value of entrepreneurship, for example, is one of these which in essence hides a whole multitude of other values in how it is executed.”

Third sector interviewee

### The values virtuous circle





Identify the people outside the organisation that are most important to enabling you to deliver your purpose, from Heads of Local Authority departments to independent funders.

## CASE STUDY

**Barton Hill Settlement Trustees**, who are almost entirely local residents and service users, met with Senior Managers to review our values as part of our strategic planning process. We paired a Board member with a senior staff member and got them to complete the values diagram exercise from the Collaborative Inquiry<sup>1</sup>. As a group we then discussed all the different diagrams that emerged. It stimulated a very challenging and rewarding discussion which we think helped both Trustees and senior management to understand each other, our motives and our values better. It led to two fundamental shifts in our work: one is the addition of a value of 'dynamism' and the other was an additional aim to be an organisation that the community is proud of. In practical terms, this means that in our work now we are giving more emphasis to us tackling the causes of issues in our area and not just the effects.

**Joanna Holmes, Senior Manager, Barton Hill Settlement**  
[www.bartonhillsettlement.org.uk/](http://www.bartonhillsettlement.org.uk/) 0117 955 6971

<sup>1</sup>This exercise is reproduced in section six

- ▶ **Identify the people** outside the organisation that are most important to enabling you to deliver your purpose, from Heads of Local Authority departments to independent funders. Help them very specifically and deliberately to know, understand and appreciate your values. Their commitment to your work and their desire to support it in appropriate ways grows from this foundation.

*"The most important thing is to talk about values. Unless you articulate them, you can't expect people to pick them up. We are constantly talking about them, through our annual review and our newsletter and so forth."*

Third sector interviewee

## CASE STUDY

**The mission of Care & Repair England** is to develop, promote and support housing policies and initiatives which enable older and disabled people to live independently in their own homes. In 2000 we lost a government contract to a private company who were able to undercut our costs in a competitive tender process. As a charitable body we make all of our information freely available and details of our finances are easily accessed. This makes it easier for competitors to make use of such information and tailor their bids accordingly. This traumatic (and almost terminal) experience galvanised Care & Repair England into considering its future continuation. Our starting point was to look closely at our values. It became clear to us that a key value was to act as a conduit for the voices of powerless people in order to influence policy by using the information gained from service delivery. This exercise taught us to be explicit in stating our values and in using them as a constant reference point in our work. It means that staff, trustees and funders are clearer about our purpose and mission and understand what is special and qualitatively better about what we do.

**Sue Adams, Care & Repair England.**  
[www.careandrepair-england.org.uk/](http://www.careandrepair-england.org.uk/) 0115 950 6500



Help people to very specifically and deliberately know, understand and appreciate your values. Their commitment to your work and their desire to support it in appropriate ways grows from this foundation.

- ▶ **The sector needs leaders** to focus on values and talk about them persuasively.

“Someone needs to stand up and say we refuse to dance to the government’s tune and government needs us.”

Third sector interviewee

“We need really skilled people delivering a culture of leadership that holds the values of the sector whilst succeeding organisationally. This requires the sector to foster this kind of leadership because it is a different kind to that in the public and private sector. We need to make values live in a world that isn’t designed for them.”

Third sector interviewee

“The sector needs the right leadership that is much clearer about values and articulates them to people with money and people in government more persuasively.”

Third sector interviewee

- ▶ **Engage the media** in what you are trying to do. Many interviewees reflected on what they see as an unsympathetic media.

“The media’s treatment of minority groupings threatens the sector’s ability to increase respect for one another.”

Third sector interviewee

## CASE STUDY

**In 2005, the National Council of Voluntary Organisations (NCVO)** carried out a large consultation about the future of voluntary sector. The aim was to find out what voluntary and community organisations thought would be the most important issues and challenges over the coming ten years, and also to hear their views on what NCVO should do to help address these challenges. The single most powerful finding was that there is something that binds us together as a sector. It is that we share certain values, and these are identifiably distinct from those of the public and private sectors. Building on this, NCVO has set itself two new strategic goals: To create a world-class research base to underpin the work of our sector, its values and the benefits it brings; and to create understanding within society of the values of this sector and what is distinctive about them. For more information see “Strategic Agenda – NCVO’s vision for the future.” **Ann Blackmore, Head of Policy, NCVO.**  
[www.ncvo-vol.org.uk/](http://www.ncvo-vol.org.uk/) 020 7713 6161

## SIGNPOST

**The Voluntary Action Media Unit (VAMU)** was set up in 2005 to research and improve the relationship between charities and the media. VAMU wants to encourage debate about the place of voluntary sector stories in media coverage. Through its research it is developing strategies and programmes that will change the effectiveness of the voluntary sector’s relationship with the media.  
[www.vamu.org.uk/](http://www.vamu.org.uk/) 020 7785 6392



Basing decisions on values, rather than fitting decisions to the conditions imposed by those outside the sector, will inevitably reflect values.

## The means: build every activity on values

- ▶▶ **The Board of Trustees needs to be assertive** about being the guardian of the organisation's values and ensuring values are implemented. Boards need constantly to ask how activity is contributing to these values.

## SIGNPOST

**The Change Up programme**, funded the Home Office Active Community Unit, was designed to develop a framework for strengthening the infrastructure of the voluntary and community sector. Six work areas have been identified; financing, governance, ICT, performance improvement, volunteering and workforce development. Each area is being tackled by a consortium of agencies, called hubs. The governance hub has three main objectives; to increase the supply of trustees and board members, to enhance the knowledge and skills of trustees and board members and to increase the governance capacity of organisations to deliver their missions. Good governance ensures that decision-making is effective and efficient and that organisations can keep up with change and make the most of opportunities. Good governance is central to ensuring that an organization is delivering its values. For more information go to [www.governancehub.org.uk/](http://www.governancehub.org.uk/) 020 7520 2514

- ▶▶ **Test each organisational decision** against the stated values of the organisation. Use your values to plan future activities. Basing decisions on values, rather than fitting decisions to the conditions imposed by those outside the sector, will inevitably reflect values.

“The sector needs to be more self-critical and self-questioning and stop falling back on the notion that ‘charity is good and if I work for a charity that means what I do is good’. The sector is held back by this assumption. It means the sector is not always about rigorously assessing needs and the best way of meeting needs.”  
Third sector interviewee

“It does feel like (the organisation could begin to resemble a commercial organisation), yes. I don't think it is insurmountable. I just think it is about looking ahead, because this has been around for about 5 years ... We knew these issues (at the start) everyone was talking about them ... but someone at the top needs to say, ‘right, we're going to go ahead with this but we are going to decide a limit to this ... so we know at what point we are going to say ‘no.’”  
Third sector interviewee\*



## To deliver public services or not to deliver public services? Approaching this question from the starting point of values begs a set of different questions.

Many of the interviews turned to the knotty discussion of delivering public services and the potential effect on values: To deliver public services or not to deliver public services? Approaching this question from the starting point of values begs a set of different questions. Is it consistent with your values to deliver this service? How does the design and commissioning process relate to your values? Does delivering this service enable the sort of relationship the organisation has with users that is consistent with your values? If the requirements and conditions of service are not consistent with your values, can they be changed? Organisations that stay focussed on their values negotiate the terms of the contract in a way that reflects the organisation's values, or they turn it down.

“Fiona McTaggart (as Minister with responsibility for the voluntary sector) said organisations should refuse all contracts that don't offer full costs recovery – and we should. Government can turn the sector into a cheap short term extension of itself because voluntary organisations are prepared to let it.”  
Third sector interviewee.

“We had the opportunity to receive a large sum of money (over £1.5 million) from a government department, but we didn't like the terms. So we said no. We felt that what we were trying to do and the way we wanted to do it was the right way. We know more about this than the people sitting in Whitehall. Sticking to this was more important than taking the money. It was very powerful.”  
Third sector interviewee

“The people who receive services should have an enormously significant role in shaping those services. For example, in one town 80% of drug services favoured a ‘harm minimisation’ model over an ‘abstinence’ model as a way of supporting drug users. Research established that 96% of drug users in that area sought abstinence as their goal. This is a ludicrous situation and some services need to be ripped up and questioned about for whose benefit they exist.”  
Third sector interviewee

“The government sees the sector as malleable. The process of opposing therefore gets more adversarial.”  
Third sector interviewee

### CASE STUDY

**Revolving Doors Agency** works with people caught up in a cycle of crisis, crime and mental illness. We develop practical schemes based in police stations, courts and prisons to help our clients gain access to the support they need. What we learn enables us to conduct research and policy work and to provide project development support to other agencies. We also work with a range of relevant public sector agencies including the National Offender Management Service (NOMS) which has responsibility for delivering services that will reduce re-offending and reconviction. For the past year, we have been leading the Partners in Reducing Reoffending Programme



Does delivering this service enable the sort of relationship the organisation has with users that is consistent with your values? If the requirements and conditions of service are not consistent with your values, can they be changed?

(PiRR) which is designed to help small charities work together so that they are able to bid to run services in the new NOMS market – where service contracts will be contestable. A big concern for the charities involved was that all contracts specifications would include the requirement that the delivery agency would have to take a coercive approach, for instance, to report any user of the service that broke the terms of their offender agreement. Whilst some charities felt able to do this, many smaller charities – including ourselves – felt that this would compromise one of our core values. As charities, we have a role as ‘witnesses to decency’ meaning that we remain outside the system to work with people based on their needs and not whether they meet a sentence plan. This has been a crucial part of the third sector’s ability to engage where others can’t. We took this argument to the Regional Offender Manager on behalf of PiRR, explaining how the value of the third sector was in its objective and non-coercive role. Sticking to this principle was more important to us than the possibility of losing funding. Following negotiations, NOMS in London agreed to recognise the role of non-coercive services in its delivery plan and to commission a diverse range of services, including non-coercive interventions. By sticking to our values, we were able to implement our values even more powerfully.

**Nick O’Shea, Director of Development, Revolving Doors Agency.**  
[www.revolving-doors.co.uk/](http://www.revolving-doors.co.uk/) 020 7253 4038

- ▶▶ **Be confident in negotiations** with funders. Use the expertise of the organisation as a lever in discussions so that the work you do together fits with your values.

## CASE STUDY

**PSS (formerly known as Liverpool Personal Service Society)** has pioneered new ways to support people within their communities since 1919. We offer personal and practical help to thousands of people across the northwest, Scotland and north Wales. A strategic analysis led PSS to focus on an area of expertise (housing and support in community settings) and decide to actively diversify funding sources beyond just our local council. PSS now delivers services for over 40 authorities. Our expertise and range of funding sources gives a strong bargaining position, allowing us to walk away from negotiations if arrangements are unfavourable. One way in which we have used this is to insist upon full cost recovery, and not to subsidise service delivery costs from other sources. However, we have taken these ideas further. We operate in a market situation competing with private businesses, charities and public services. To survive we have to be aware of the demand for services and the competition. In negotiations with public authorities we seek to achieve market prices. Where we are not able to achieve



Use a range of organisational structures to support the promotion of values such as cross organisational groups that bring staff from different projects and with different roles together.

a price that allows full cost recovery, we do not accept the contract. This enables us to make a modest surplus on the delivery of our services. Surpluses arising from service delivery are placed alongside non-restricted donations and investment income in PSS's Innovation Fund. Last year, transfers to this fund totalled £200,000 and enabled us to continue to pioneer new work at the same time as delivering good services. Being able to carry out this dual role is central to the way we work.

**Robin Currie, Chief Executive, PSS.**  
[www.pss.org.uk/](http://www.pss.org.uk/) 0151 702 5555

## SIGNPOST

**Public law** is the set of legal principles governing the exercise of power by public authorities. Public law remedies are those procedures which citizens can use to challenge the fairness or legality of decisions. The Public Law Project (PLP) provides casework, research and policy, training and publications to improve access to public law remedies for those whose access is restricted by poverty, discrimination or other barriers. A priority area of work for the organisation is 'defending the voluntary sector'. PLP, working jointly with NACVS, has just begun a major new project to provide advice and training to voluntary sector organisations to assist and support them to challenge bad decisions by public bodies. The aim of the project is to help groups to negotiate effectively, protect their rights and to maintain the services they provide when faced with funding cuts, policy changes or other disputes with public bodies. The project developed following a number of successful cases in Leicester, Cardiff and elsewhere, in which PLP helped groups to challenge funding cuts and other decisions affecting their work. Further details of the three-year project funded by the Big Lottery Fund are available from the PLP and NACVS websites. A guide on how to make use of judicial review is also available on the organisation's web-site. Using public law measures is an effective way of taking on practice by public authorities and not just accepting things as they are. [www.publiclawproject.org.uk](http://www.publiclawproject.org.uk) [www.nacvs.org.uk](http://www.nacvs.org.uk)

- ▶▶ Use a range of organisational structures to support the promotion of values such as cross organisational groups that bring staff from different projects and with different roles together. Make sure there are opportunities for staff to get together, particularly where the organisation has more than one base.

"The messages given at (my job interview) made it clear what sort of organisation this was and the values it held to. The question ... 'how do you reduce the rate of evictions in this hostel?' ... gives you the message that we are into retaining people and reducing evictions ... Pretty soon you begin to see how it works ... a lot of it is fairly informal." Third sector interviewee\*

"We used to have organisational conferences. They were a good source for organisational values. We don't do that now, we are more dispersed, there are people I used to see in head office, but I don't go there for years now, we are larger with hundreds of people. Those get-togethers used to reaffirm what we were doing, helped you feel you were working on the same thing. Now the training centre [in



No values statement would ever say that the organisation strives to deliver mediocre services. Organisations that are true to their values will be delivering excellence.

London] is at a different venue from HQ so I don't see people at HQ so often." Third sector interviewee\*

▶▶ **Focus on quality** No values statement would ever say that the organisation strives to deliver mediocre services. Organisations that are true to their values will be delivering excellence. As such, organisations need to be well run and efficient. Full cost recovery is just the starting point.

## CASE STUDY

**Amongst the many services provided by Barton Hill Settlement** in east Bristol is a Kids Club. There have been constant differences of opinion between Barton Hill Settlement and the two different groups who fund this project about the number of workers that should be employed to run the activities. One of the funding groups argues that the art session for eight to eleven year olds should be run with two workers. Barton Hill thinks it takes three workers to provide the quality of service that is consistent with its values. The organisation's Trustees and staff feel so strongly that young people in Barton Hill deserve a good quality service that they have decided that they can no longer compromise this value and will close the club at the end of March 2006 if they are not able to run the service with the staff ratios required.

**Joanna Holmes, Barton Hill Settlement.**  
[www.bartonhillsettlement.org.uk](http://www.bartonhillsettlement.org.uk)  
0117 955 6971

## SIGNPOST

**The Compact on relations between government and the third sector** was agreed in 1998. The Compact is made up of codes of good practice which set out the rights and responsibilities of government and sector organisations across a range of themes: black and minority ethnic groups, community groups, consultation & policy appraisal, funding and volunteering. For example, the Funding and Procurement code, revised in 2005, seeks to improve funding and procurement relationships, to the mutual advantage of the funder and funded, and safeguard the sector's independence. The Code is for everyone in England involved in distributing, seeking or receiving public funds. The Code advocates the sector's role should be adequately resourced on a full cost recovery basis across a mix of funding arrangements and with multi-year roll-forward funding. Local areas are now producing local codes of good practice as part of Local Compact development work to better reflect local priorities. <http://www.thecomcompact.org.uk/> The Compact Advocacy Programme at NCVO can take up cases on behalf of third sector organisations that believe a public sector agency has breached the terms of the Compact. Recent successful cases have concerned meeting consultation requirements, providing fair access to funding and providing contract mediation. CAP are now targeting specific themes for their work and are actively looking to take up cases concerning full cost recovery.

**Compact Advocacy Programme NCVO**  
[www.ncvo-vol.org.uk/compactadvocacy/index.asp](http://www.ncvo-vol.org.uk/compactadvocacy/index.asp) 020 7713 6161



Explicitly focus on the values of the organisation in the recruitment and induction of Board members, paid staff and volunteers.

## SIGNPOST

**Full cost recovery.** Acevo (Association of Chief Executives of Voluntary Organisations), New Philanthropy Capital (NPC) and accountants KPMG, have developed a guide and interactive toolkit to calculate and understand the total cost of each of your activities. Called “Full Cost Recovery – a guide and toolkit on cost allocation” the guide, which is also available as an interactive CD-Rom, is a cost allocation template recommended by the Department for Education and Skills and HM Treasury. It can help to make decisions about your funding, e.g. in a competitive tender situation, how much should you bid; or how much grant funding do you actually need. The toolkit is applicable to small projects (e.g. a new bed in a hospice) or to an entire area of activity (e.g. patient services). As well as being used to calculate the cost of specific outputs, it can also be used to cost outcomes for the beneficiaries (e.g. patients informed about their condition). [www.acevo.org.uk/](http://www.acevo.org.uk/) or [www.fullcostrecovery.org.uk](http://www.fullcostrecovery.org.uk) The guide on its own costs £20.00 and with the CD-Rom costs £44.20. There is a copy at the library at the Directory of Social Change, 24 Stephenson Way, London, NW1 2DP 020 7391 4800 [www.dsc.org.uk/](http://www.dsc.org.uk/) or most local libraries will allow you to request a copy for a small charge. The authors are Caroline Fiennes, Cathy Langerman and Jeni Vlahovic and the ISBN is 1 9545652 8 2

- ▶▶ **Establish specific budget lines** that reflect the importance you place on values. For example, for activities that actively promote values such as user involvement initiatives, strategic planning, staff development and training.
- ▶▶ **Explicitly focus on values in the recruitment** and induction of Board members, paid staff and volunteers. Using a tool such as the values diagram exercise in section six of this report could form part of the induction of new staff. Organisations with evidence of the strongest focus on values talk about staff joining the organisation as part of a lifestyle commitment. So, going to work is fundamental to their view of the world and what they want their role in the

world to be. Working in a particular organisation becomes an expression of resistance against conditions that are unacceptable.

“Yes, within the organisation we often hear people refer to a ‘Speaking Up’ type person, and everyone has a common understanding of what this means.”

Third sector interviewee

“Volunteers share the broad values of the organisation, we also provide training and orientation so that they can fully understand our values.”

Third sector interviewee



Collaborate with organisations that share your values and, by implication, if you collaborate with organisations that do not share your values, be clear about the purpose of collaboration.

- ▶▶ Collaborate with organisations that share your values and, by implication, if you collaborate with organisations that do not share your values, be clear about the purpose of collaboration. Various types of collaboration are possible – clustering, networks, alliances, coalitions, inter-agency working, as well as merging. There is an implication here also for the issue of replication. What is being replicated – an idea, a model, or the values? Being able to identify the values that underpin a successful project is crucial for identifying others to work with on successful replication.

“I’m interested in the potential of clustering, for very small organisations to come together under the umbrella of the community and create new models of inter-agency working, which is not about merging.”

Third sector interviewee

“Cooperation is vital. It’s difficult in a competitive contract bidding environment but it’s not impossible – the sector is good at win/win innovation.”

Third sector interviewee

“The sector needs to have the guts to be clear about its own independence and needs to work together to advocate for itself and for changes in policy. Much of what has been accepted in education and public services has been pioneered by loopy individuals who wouldn’t take no for an answer.”

Third sector interviewee

## SIGNPOST

### NCVO Collaborative Working Unit.

The Unit’s role is to promote a range of ways of working collaboratively and to help organisations to understand the benefits and potential pitfalls of collaboration, as well as the false assumptions, for example, that collaboration will automatically save time and money. The Unit shares models and case studies of types of collaboration, holds good practice events, offers advice on tools for collaboration (such as IT) and produces guidance material. Contact **Kate Aldous, Manager, NCVO Collaborative Working Unit** [www.ncvo-vol.org.uk/](http://www.ncvo-vol.org.uk/) 020 7520 2440

## The end: measure your work against your values

- Measure what you do in ways that demonstrate the impact of your values. Speaking in February 2005, John Healey, as minister with responsibility for social enterprise, expressed an increasingly common position that “claims about the distinctiveness of the sector do not stand up ... there needs to be a stronger evidence base and more concentration on performance management” (in Third Sector 2.2.05). If the third sector wants this performance management to be meaningful to the work it does, organisations need to increase their own, and other people’s, understanding of what values contribute to the quality of their



Monitoring systems taken in isolation are inadequate in demonstrating the success of an organisation as a whole.

work and how being led by values leads to achievement. Particularly as competitive tendering and 'level-playing-field' procurement will tend to prioritise price, because it is measurable.

"The sector needs to be clearer about benefit, think harder about evidence, look at end result. The sector should be aiming to put itself out of a job."

Public sector interviewee

"Measurement leads to greater confidence on the part of users and supporters in the ability of organisations to deliver, and more legitimacy on the part of organisations negotiating with other bodies."

Third sector interviewee

## CASE STUDY

**New Philanthropy Capital** is an organisation that advises donors and funders on how to give more effectively. It carries out research and analysis of charities in specific fields to identify those achieving excellent results. These organisations are then brought to the attention of potential donors. The organisation acknowledges that assessing effectiveness is far from straightforward so takes a flexible approach and ensures analysis takes account of the complex environment in which organisations operate. However it analyses organisations because it assumes that some are better than others arguing that good organisations deserve funding.  
[www.philanthropycapital.org](http://www.philanthropycapital.org)

- **Include values outputs** in monitoring systems. There is widespread recognition that monitoring systems taken in isolation are inadequate in demonstrating the success of a project or an organisation as a whole. Monitoring systems have traditionally focused on indicators that can be counted, such as the number of people attending training, or receiving advice or entering employment. These measures do not give a complete picture of the impact that an organisation can have on someone's life such as improved communication skills, enhanced employability or, even more intangible, increased self-reliance, self-confidence or happiness. These changes often occur over very long periods of time.

Lots of work has been done to develop techniques, such as distance travelled, that go beyond counting outputs. However, whilst many organisations are aware of the importance of measuring their work in these ways, very few have developed systematic ways of doing so.

"I did a review of our organisation for the 20th anniversary looking all the way back to when we started. I spoke to lots of people who had been involved then who said that they can see now how their lives were completely changed by the work they did with us. Their lives were set on completely different courses. The changes at the time were small, but the passing of ten or twenty years means they can now see the result and the changes are enormous. I suppose that's not much help for a funder that wants change to be



If measurement is approached from the point of view of values, not only is what is delivered measured but also the process of delivery.

achieved by the next financial year, but that's the nature of the work and we should make sure we can reflect that."

Third sector interviewee

"The sector struggles to provide evidence of how translating values into outcomes makes a difference."

Third sector interviewee

## CASE STUDY

**Off the Streets and into Work** is a London-based charity, which supports people who are homeless or at risk of homelessness to break out of poverty and exclusion. Our aim is to help homeless people move towards employability. We developed the Employability Map having recognised that for the majority of our client group, we needed different ways of measuring progress. The Employability Map consists of five areas relevant to employability; motivation, lifestyle, readiness for work, basic skills and skills for finding work. Each area is split into three zones according to the level of support that a client requires. For each of the five areas on the map, the client and the worker decide together which zone the client falls into. The form comes with a detailed description of what kind of behaviours each of the points on the scale represent, to make the process as objective as possible. Creating the first employability map works like an initial assessment, providing a snapshot of the client's current position and highlighting areas of concern. It then feeds directly into action planning which is then reviewed regularly to highlight any progression made.

**Ima Miah, Off the Streets and Into Work, [www.osw.org.uk/](http://www.osw.org.uk/) 020 7089 2722**

### ■ Measure process as well as outputs

If measurement is approached from the point of view of values, not only is what is delivered measured but also the process of delivery. This must look at how well the delivery of outputs has embodied values such as empowering people and pursuing equality both of staff and service users. Being 'informed' by values is not enough, the work has to live and breathe them.

"Our values are also reflected in the attitude of the agency to its own staff. We do capacity building of the staff. This is borne out by the fact that, despite short-term funding, the agency team has stayed together without change for the last eight years. We're a family. We support each other. We work totally on trust."

Third sector interviewee

## SIGNPOST

**Social accounting and auditing** is a way of measuring and reporting on an organisation's social and ethical performance. From 1995 to 2000 the New Economics Foundation (nef) carried out a series of pioneering social audits of companies (including Camelot, The Body Shop, Traidcraft and Ben and Jerry's) as well as international public and third sector organisations. Having led the development of the method, nef helped to form the Institute of Social and Ethical Accountability to promote professional standards of social accounting and auditing.

[www.accountability.org.uk](http://www.accountability.org.uk)



Focussing passionately on values provides the means to negotiate the forces that have the potential to change who we are and what we do. Organisations must make their values live.

- **Review your work** and if it is not delivering your values, look hard at what you are doing, and how you are doing it.

“If we find that we are not delivering on our values, we don’t change our values, we deliver our work differently. We need to either build a new programme of work, or we need to pack up and go home.”

Third sector interviewee

“The third sector has no right to exist other than in delivering positive change for society. If it doesn’t do that it should pack up and go home. The work that the third sector does is often around mopping up the debris of much bigger societal problems. Sometimes the sector has its head in the sand and pretends that doing the little bits of mopping up is good enough. The third sector also needs to be a force for real societal change, to do itself out of business.”

Third sector interviewee



## Conclusion

The sector can decide what happens to its values. Focussing passionately on values provides the means to negotiate the forces that have the potential to change who we are and what we do. Organisations must make their values live.

The sector exists in the midst of tensions – to comfort or disturb, to deliver services or not deliver services. The solution to these tensions is to go back to the organisation’s values. What do they tell you to do? There may be certain services which third sector organisations are best placed to deliver, and others which they are not.



We need to go beyond the vague assertion that the third sector's values are different to other sectors and say with confidence and authority that what inspires us, how we work and what we are trying to achieve is done in a way that is distinctive.

Social policy and policy on the third sector would be greatly enhanced by specific work between government and third sector organisations to identify and agree where values are shared and use this as the foundation for discussion and development. Specific use could be made of this in the proposals to develop a public benefit test as part of the Charities Bill.

Make the market place suited to values and the delivery of values, rather than suited to the needs of the commissioner.

Give third sector organisations a dynamic role in developing services.

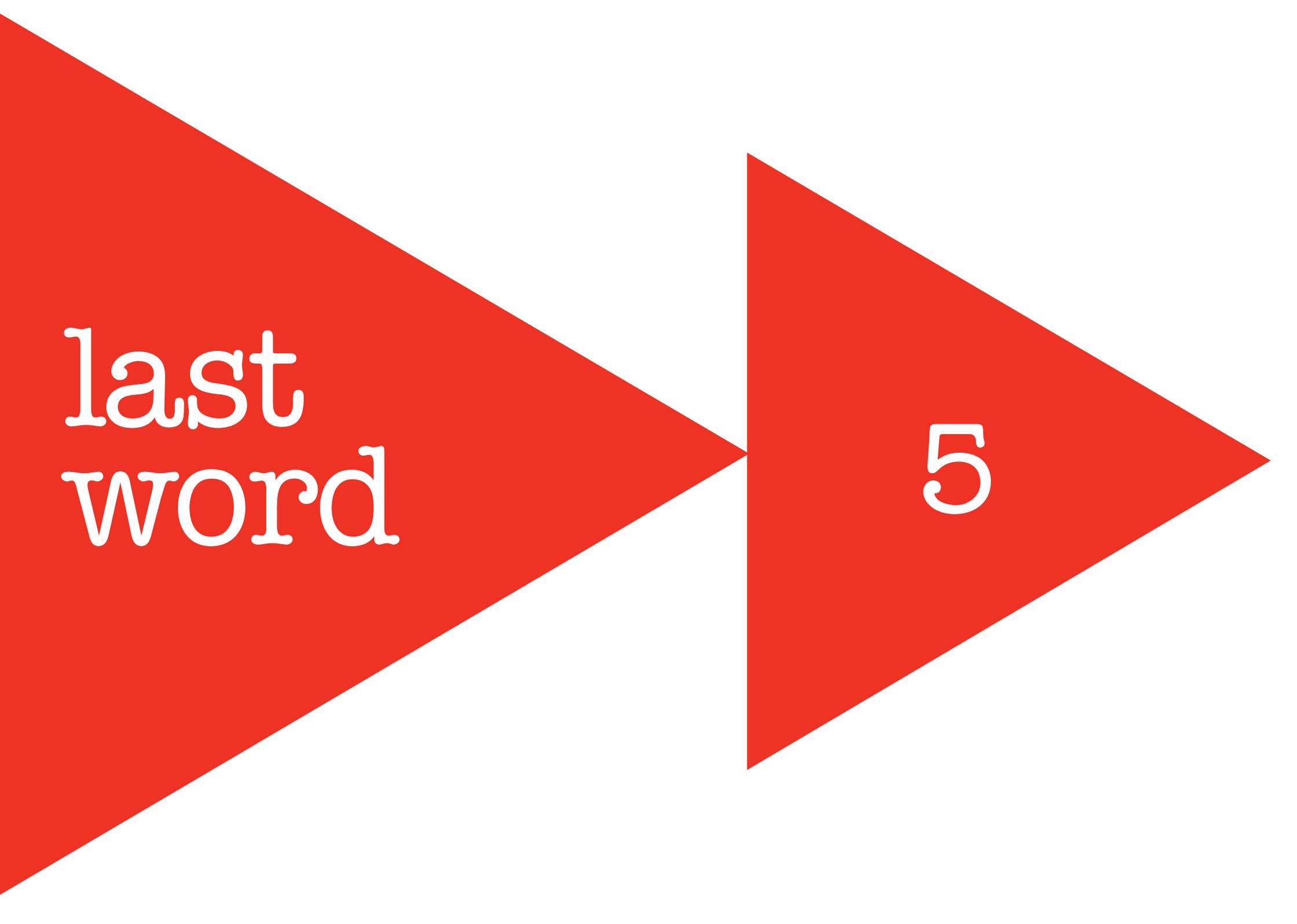
Funders could provide funding in ways that allow organisations to promote values. Including – core funding, strategic funding, with fewer strings attached and less monitoring of outputs, with more trust, over longer term, continuing to fund projects that work, supporting capacity building, with more input into the design of funding schemes and outputs and more investment in realistic exit strategies.

“I would say that I’m pretty optimistic about the values of the sector. We have got to remember that we are a broad church. There’s room for the lifeboats and there’s room for running a church hall.”

Third sector interviewee

“If I said, for example, that the role of the third sector as a campaigning sector was under threat from the need to be involved in contracting in order to make money to keep the organisation going, I would be ignoring the fact that new campaigning organisations are always emerging to take up issues that might have been dropped by other organisations. The most important strength of the sector is its diversity. It doesn’t actually matter that we have become a service provider rather than a campaigning group, because there will always be space for new campaigners or service providers.”

Third sector interviewee



last  
word

5

# Last word **Final conclusions**



- ▶ There is a set of values that are meaningful to third sector organisations.
- ▶ These values inspire people to work and volunteer in the third sector.
- ▶ Separately these values are present in the public and private sectors. However, the way in which third sector organisations combine and prioritise these values is unique.
- ▶ There are forces that have the potential to change the values of the third sector.
- ▶ The organisations that navigate these forces successfully are those that passionately focus on their values.

- ▶ The biggest threat to the sector comes from within, from organisations not focusing on their values.
- ▶ There are practical things that third sector organisations, and those that support them, can do to put values at the centre of every activity.

What do the findings of the Collaborative Inquiry mean for sector organisations?

It is a time of change, opportunity and threat.

We need to go beyond the vague assertion that the third sector's values are different to other sectors and do this with confidence and authority. We need

to concentrate on what inspires us to do our work, on how our methods help us to be effective and on what we want to achieve. Our work sits alongside the contribution of the other sectors, we claim no moral high ground, but we believe that the approach is distinctive and valuable and must not be lost.

Talking about values, building every activity on values and measuring activity against values are the key to moulding, rather than being moulded by, the forces that are exerted on the sector.

Third sector organisations have to take responsibility for making this happen. No-one else will do it for us. We must be bold.

“Are you in earnest? seize this very minute  
Boldness has genius, power and magic in it”  
**Goethe**



Our  
research

# Our research **Methodology**



## Collaborative Inquiry

We wanted to develop our thinking on values with others, and therefore chose to work collaboratively. Collaborative Inquiry is an established research model, well suited to knotty problems, whereby a group of people co-research an issue of interest to them all.

We recruited a group of 12 people who were selected for their relevant skills, experiences and expertise rather than identified as representative of a particular type of organisation. However, our Inquiry Group included members from the following types of organisation:

- ▶ Voluntary and community – large and small, local and national
- ▶ Funders and Trusts
- ▶ Public sector
- ▶ Corporate sector
- ▶ Academic institutions

A full list of the members of the Inquiry Group can be found in the preamble to this report. The Inquiry Group met 5 times throughout the course of this research. The role of the Inquiry Group was to:

- ▶ consider the issues raised
- ▶ identify supporting research that is required, ensuring that diverse perspectives are taken into account
- ▶ make sense of the information that is presented
- ▶ agree key findings
- ▶ make recommendations on how the findings can be built on in the future

## Exploring Values

From the beginning of this research, we found that people struggled to express what they meant when they talked about values. We decided to give research participants examples of values or statements about values to help to frame the discussions.

We looked at values as nouns and found them to be too broad for the purposes of this research – inclusion, honesty, cooperation, independence, accountable. Some values express the way we might work – rights-based, child-focussed, but we didn't feel that these really got into the substance of what inspires the sector, how it does its work and what it is trying to achieve. Encouraged by the experience of our Inquiry Group members and by the mission statements collected from organisations in the sector, we found ourselves drawn to action, to verbs.

We compiled a list of 39 statements about the third sector's activity that express values in a 'purposeful' way. For example :

- ▶ To ensure that all citizens in society are valued
- ▶ To serve as an advocate for the concerns of excluded groups

These statements were crucial to the research phase of the project and we developed a method for interviews and group discussions that required participants to build a 'values diagram' using these statements (see section below).

Once we had completed the interviews we grouped the statements and analysed the data, before turning the purposeful statements back into forms that were more recognisable as 'values', ensuring that each value encapsulated the inspiration, the action and the

achievement elements that we identify in preamble to this report.

As such we have identified values as revealed by a list of statements reflecting goals or purposes. We think it is interesting to note that in the third sector it is easier to discuss values in terms of verbs, and conclude that this reflects the sector's focus on action.

## Building values diagrams

During group discussions, participants were asked to make a values diagram using the 39 statements. The instructions for making the diagram were :

- 1 Read these statements about values and choose the statements that you think reflect the values of the third sector
- 2 Stick them onto paper to construct a values diagram for the sector

- 3 You can link the statements with lines and words, and you can add your own statements
- 4 When you have finished your diagram please stick a red dot on the values that you think are unique to the sector

Participants in one to one interviews were also invited to stick a coloured dot on :

- 5 values that are the same throughout the sector
- 6 values that you think are under threat (and note from whom?)

The data from the values diagrams could then be recorded on an access database, which identified which statements were chosen, and which were marked as unique, common or under threat. This methodology allowed us to collect quantitative data from qualitative interviews.

## Interviews and Focus Groups

The Inquiry Group identified a target list for interviews and focus groups. We then carried out on their behalf :

- ▶ 31 in-depth interviews (the interviewees are listed at the start of this report)
- ▶ 4 focus groups involving a total of 28 people
  - Community Development Foundation Community Workers
  - Barton Hill Settlement Trustees
  - Community Links Business Leaders Group
  - Community Links front-line staff
- ▶ Presentations to 2 seminars of findings in progress involving a total of 65 people

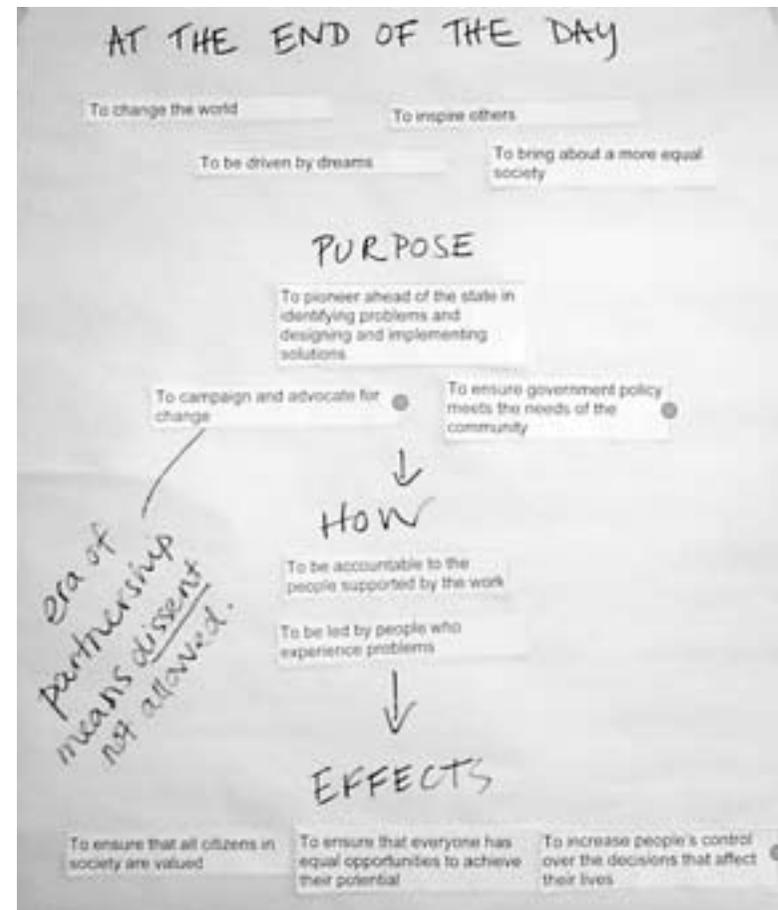
- NCVO Researching the Voluntary Sector conference
- Baring Foundation Core Costs Club seminar

We asked the following questions in the interviews.

- ▶ Why do you work in / work with the sector? – why work in this sector, and not another?
- ▶ What are the values of your organisation?
- ▶ Do you think values are important to your organisation?
- ▶ Does everyone in your organisation understand these values?
- ▶ What do you think are the values of the sector?
- ▶ Ask the interviewee to make a values diagram using the pack provided
- ▶ Label the values that you think are unique to the sector

- ▶ Are they unique on their own, or just when combined?
- ▶ Label the values that are the same throughout the sector.
- ▶ Are the values you have identified as common constant over time or do they change?
- ▶ Label the values that you think are most under threat and from whom?
- ▶ Can you give any examples of where you think values have been translated into action particularly well?
- ▶ What makes it difficult to stay true to values? Give examples.
- ▶ How can these values be protected / extended / enhanced?

The data collected during these research activities was presented to the Inquiry Group for analysis.



Example of a values diagram

## The Quantitative Data – What are the values of the third sector?

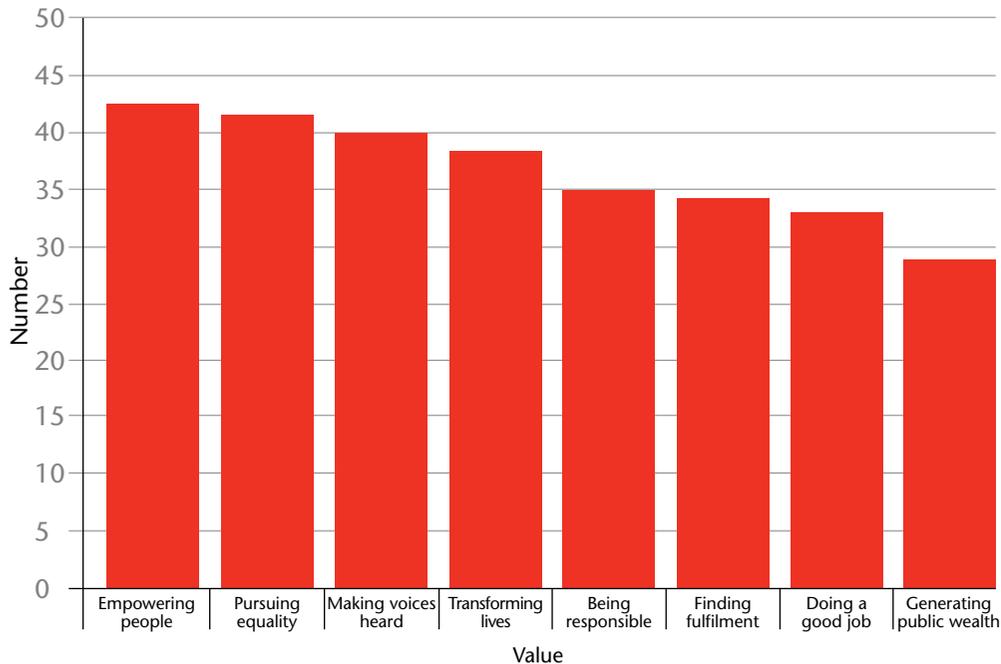
The table below shows a simple count of how many times each statement was selected by participants

Value	Total	Value	Total
To increase people's control over the decisions that affect their lives	45	To put something back	34
To ensure that everyone has equal opportunities to achieve their potential	44	To care for people	33
To ensure that all citizens in society are valued	43	To create public benefit	32
To empower people	43	To be led by the needs of society	32
To foster the growth of action to meet community needs	42	To help people who are less fortunate	32
To provide services that meet needs	41	To reduce isolation	31
To campaign and advocate for change	40	To be led by people who experience problems	30
To inspire others	40	To be part of a moral community	30
To bring about a more equal society	39	To find a shared identity with others based on a common experience	28
To do something about the problems that diminish the society	37	To feel personally fulfilled	27
To change the world	37	To be driven by dreams	27
To increase respect for each other	37	To create a society where our work is not needed	26
To encourage a more active, participatory citizenship	37	To encourage enterprise	25
To serve as an advocate for the concerns of excluded groups	36	To work with others	24
To ensure government policy meets the needs of the community	36	To carry out acts of resistance against society's problems	24
To support people to play their part in society	35	To be governed by Trustees who are volunteers	19
To be accountable to the people supported by the work	35	To generate a surplus to re-invest in services for the community	19
To provide resources for the community to use	35	To not generate an economic profit	12
To pioneer ahead of the state in identifying problems and designing and implementing solutions	35	To deliver public services	12
		To alleviate the problems of national economic performance	11

We sorted these statements into a number of categories, which we felt summed up the 'types of value' behind each one.

The chart below shows the average number of times statements in these categories were chosen.

Average number of times statements from this category of values were chosen



Once participants had designed their diagrams, we asked them to consider whether the values they chose were common across the sector.

The statement chosen by half those interviewed as common is: *To do something about the problems that diminish society*

A small number of interviewees gave reasons for values not being common across the sector.

“Bigger organisations have to be more corporate, small local organisations can really make a difference.”  
Third sector interviewee

“You either help people or you want to change things and the key values for one are not the key values of the other.”  
Third sector interviewee

“Not all organisations have the same change agenda. For example, a group that runs a mother and toddler group may want to ‘work with others’ but may not want to ‘change the world.’”  
Third sector interviewee

We also asked participants whether values were constant over time or whether they changed?

Nearly half those we asked felt that values are constant.

Values change due to the social context and political context and sometimes the language we use to talk about values changes.

## Are these values unique?

The table below shows a count of the number of times each statement has been identified as unique (top 9 shown only).

Value	Unique?	Total
To increase people's control over the decisions that affect their lives	17	45
To serve as an advocate for the concerns of excluded groups	16	36
To campaign and advocate for change	14	40
To be accountable to the people supported by the work	13	35
To ensure government policy meets the needs of the community	12	36
To increase respect for each other	11	37
To ensure that all citizens in society are valued	10	43
To pioneer ahead of the state in identifying problems and designing and implementing solutions	10	35
To be led by people who experience problems	9	30

We noted that the number of times that statements were identified as unique is significantly lower than the number of times they were selected in total. We asked interviewees to explore this and found that whilst individual values were shared with other sectors, the way values are prioritised and combined in the third sector is unique.

“‘to empower people’ combined with ‘to be led by people who experience problems’ is unique. A school does the first one, but not using the approach captured in the second statement.”  
Third sector interviewee

Nine interviewees said that something else about sector is unique

“Voluntary organisations can’t do anything to harm anyone. We can’t evict them or take their children into care. Our power is we have no power.”  
Third sector interviewee

“Caring for people is not unique but giving time voluntarily to do so is.”  
Third sector interviewee

“What’s distinct is the context we work in and the methods we use.”

Third sector interviewee

“What is unique is the **Heineken effect**, reaching the people other organisations and universal services don’t reach.”

Third sector interviewee

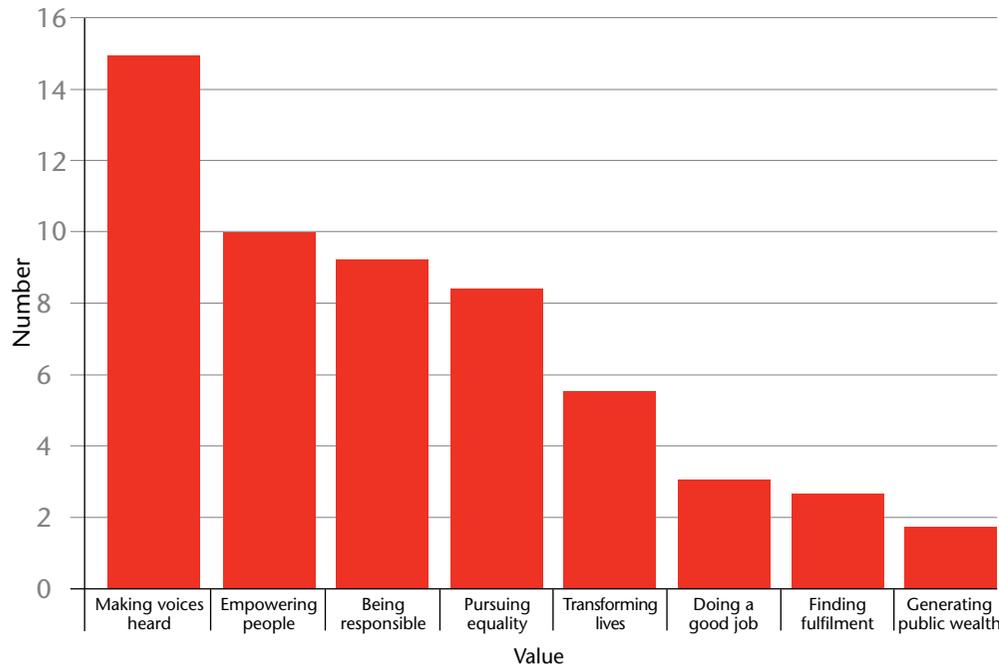
“We exist because of the will of the people involved, not because of the will of the government or commercial imperatives.”

Third sector interviewee

The chart below shows the average number of times statements in each of our categories were identified as unique.

The chart below shows the average number of times statements in each of our categories were identified as unique.

Number of times statements from these categories of values were identified as unique



We noted that making voices heard has moved up from 3rd place to 1st place and that being responsible has moved up from 5th place to 2nd place.

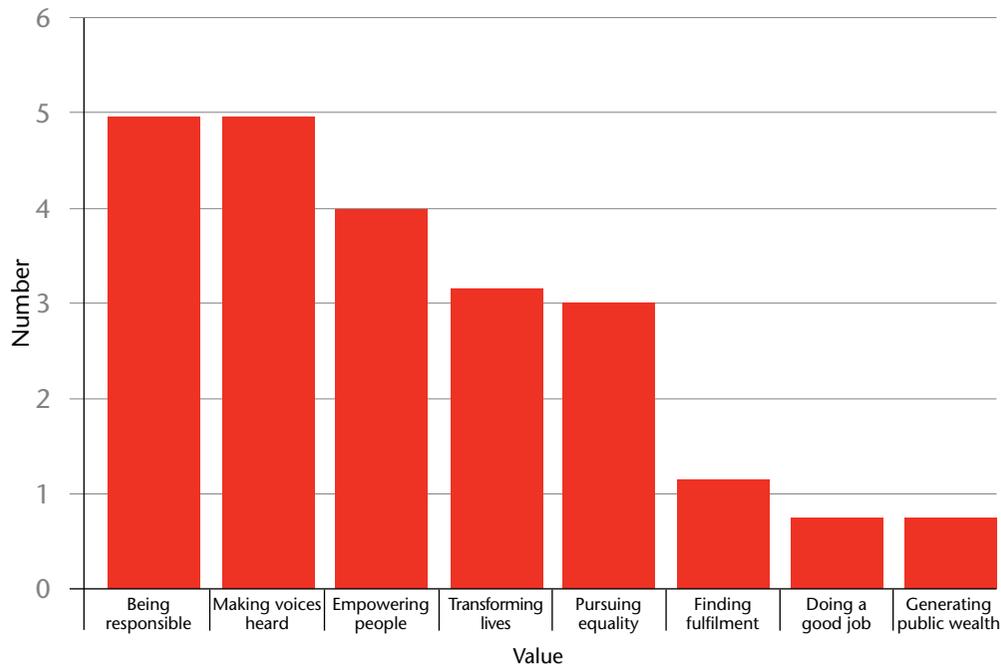
## Values under threat

The table below shows a count of the number of times each statement has been identified as under threat (top 6 shown only).

Value	Unique?	Total
To ensure government policy meets the needs of the community	8	36
To increase people's control over the decisions that affect their lives	7	45
To be accountable to the people supported by the work	6	35
To pioneer ahead of the state in identifying problems and designing and implementing solutions	6	35
To bring about a more equal society	5	39
To encourage a more active, participatory citizenship	5	37

The chart below shows the average number of times statements in each of our categories were identified as under threat.

Average number of times statements from this category of values were identified as under threat



We noted that same categories of values that were identified as unique are also identified as under threat.

## The Qualitative Data

At meetings of the Inquiry Group and through interviews and focus groups we collected a large amount of qualitative data which we analysed by looking for key themes. This data is the basis for our findings and direct quotes from the data are used to illustrate this report. In particular, we have used the qualitative data to inform the development of section four.



# values toolkit

## Things to do

In the course of the Collaborative Inquiry, and in thinking about what the findings of the Inquiry might mean for our organisations, we developed some exercises that help individuals and groups to think about and discuss their values. A selection is set out in this section.

We have also found that talking about music, books and films stimulates people to think about their values. We have included some of our lists in this section together with some places to visit and some quotes to inspire. Some of these are serious, others are fun but we hope that they serve to suggest that you can *talk about* values in a variety of ways.



## Exercise 1 Talk about your values

We found that it was sometimes quite hard to get started on a discussion about values. If you suddenly ask people to talk about their values they get a bit tongue tied. We devised an exercise that helps to overcome this.

### Making a Values Statement (for individuals or groups, 60 minutes)

1. Give people a list of statements of values or about values as a starting point.
2. Ask them to sort through the statements and select the ones they feel are most meaningful.
3. Give them a big sheet of paper and ask them to arrange the statements in some kind of diagram
4. Draw on the diagrams, for example use lines to connect things that you think fit together, or write in statements that you think are missing. Use coloured dots to identify particular statements. (For example, we asked participants to mark the statements that they thought were unique or common or under threat).
5. Discuss the diagrams.



- ▶ This worked nicely as a research tool in a one-to-one interview but was brilliant to do in a group.
- ▶ If you're working with a group, think about who you can involve. A group of trustees may find this of immediate practical use. You might find this useful to do with frontline staff, with people from different teams or with service users. Mix it up and involve everyone.
- ▶ Be clear about the question at the beginning. Are you asking people about their values? About the values of the organisation? About the type of work you are doing? Or about the wider sector?
- ▶ On page 61 there is the list of statements we used in this research. You can photocopy this list or you can make up your own statements. The statements themselves aren't an exhaustive list of all the values people might have. We found it worked best to have whole sentences rather than just a word or two, and also that an action focus was helpful (verbs not nouns).
- ▶ When we did this exercise we copied the statements onto coloured card, cut them into strips with one statement on each, and put them in an envelope with the instructions, some bluetac, some sticky dots and a big piece of blank paper. So participants got a little pack with everything they needed. Remind participants to stick everything down if you want to be able to take the diagrams away at the end.
- ▶ Give people about 20 minutes to make their diagrams individually and then spend plenty of time discussing them. Stick the diagrams on the wall and ask people to talk through what theirs is about. Ask questions. Look for common themes.
- ▶ Think about how the session will end and what you will do afterwards. Can you use this to review your organisation's values or are you hoping to re-energise the values you have? What do you want to get out of this? What do you hope that participants will take away from the session?

# Statements for the values diagram exercise

- To be driven by dreams
- To carry out acts of resistance against society's problems
- To change the world
- To create a society where our work is not needed
- To create public benefit
- To do something about the problems that diminish our society
- To foster the growth of action to meet community needs
- To inspire others
- To pioneer ahead of the state in identifying problems and designing and implementing solutions
- To bring about a more equal society
- To ensure that all citizens in society are valued
- To ensure that everyone has equal opportunities to achieve their potential
- To increase respect for each other
- To generate a surplus to re-invest in services for the community
- To not generate an economic profit
- To be governed by Trustees who are volunteers
- To be accountable to the people supported by the work
- To be led by people who experience problems
- To be led by the needs of society
- To campaign and advocate for change
- To empower people
- To increase people's control over the decisions that affect their lives
- To serve as an advocate for the concerns of excluded groups
- To support people to play their part in society
- To be part of a moral community
- To feel personally fulfilled
- To find a shared identity with others based on a common experience
- To put something back
- To work with others
- To alleviate the problems of national economic performance
- To care for people
- To deliver public services
- To encourage a more active, participatory citizenship
- To encourage enterprise
- To ensure government policy meets the needs of the community
- To help people who are less fortunate
- To provide high quality services that meet needs
- To provide resources for the community to use
- To reduce isolation

## Music that makes us think about values

### **War Requiem** – Benjamin Britten

Written to celebrate the consecration of the new Cathedral of St Michael in Coventry in 1962. The piece combines first world war poems by Wilfred Owen, killed in action a week before the signing of the Armistice in November 1918, and the Latin requiem. It is a statement of Britten's abhorrence of violence and the inhumanity of war.

### **Redemption Song** – Bob Marley

“Emancipate yourself from mental slavery, none but ourselves can free our minds ...”

Bob's version reigns supreme but the song has been covered by many others. The version by Johnny Cash and Joe Strummer brought together two radical icons from different genres who found a shared value in these lyrics.

### **What's Going On** – Marvin Gaye

“Picket lines and picket signs, don't punish me with brutality. Talk to me, so you can see what's going on”

### **Search for the Hero Inside Yourself** – M People

“And that's why you should keep on aiming high. Just seek yourself and you will shine.” Our friend Sanjiv thought that line “search for the hero inside yourself” was ‘search for the hero in Sanjiv's house.’

### **Quartet for the End of Time** – Olivier Messiaen

In 1940 Messiaen was interned in a German prison camp, Stalag VIII/A, where he discovered among his fellow prisoners a clarinetist, a violinist and a cellist. He decided to compose a piece for this ensemble which received its first performance in front of 5,000 fellow prisoners in Barrack 27 in January 1941.

### **Nkosi Sikeleli Afrika** (God Bless Africa) South African National Anthem

“Bless our efforts of union and self-uplift, of education and mutual understanding.”

When a group of South African young people came on a youth exchange visit to Community Links, this was the song they chose to sing to our young people.

### **Ode to Joy** – Beethoven

Because it makes you feel bold

### **Ain't Got No / I Got Life** – Nina Simone

Because it's full of independence and defiance. We may not have much, but what we do have can't be taken away from us. If you haven't heard it, find a copy today and just try and resist the urge to stand up and sing along!

### **You'll Never Walk Alone** – Rodgers and Hammerstein

“Walk on, walk on with hope in your heart, and you'll never walk alone.”  
Nothing beats the power of a big crowd singing this song.

### **Between the Wars** – Billy Bragg

“I kept the faith and I kept voting, not for the iron fist but for the helping hand  
For theirs is a land with a wall around it and mine is a faith in my fellow man”  
Written during the 1984–85 miners strike but talking about the 1930s



## Exercise 2 Talk about your values

If your organisation has either some kind of statement about values or just a shared understanding of what the values are, this exercise will help you to connect the big statements to the day-to-day.

### From the general to the specific (for groups, 30 minutes)

1. Start with your statement of values or your notes of what came out of the first exercise.
2. Ask participants to identify how their department, team or project translates these statements into their day-to-day activity. (It's important that the values themselves don't change in the translation).
3. Ask participants how they as individuals 'live' the values. What do the values of the organisation mean for our individual behaviour?

### An example:

- ▶ A Community Links value : those who experience a problem understand it best
- ▶ Our local teams translate this value by using a bottom up approach to service development that engages local people in identifying the issues that affect their lives and designing appropriate solutions
- ▶ Our national team translates this by valuing local knowledge highly wherever they work in the UK rather than assuming that what works in east London will work well in any local context.
- ▶ Living this value on a personal level means that staff need to take time to listen to and act on the suggestions of service users, and that managers need to do likewise with frontline staff.



- ▶ A useful exercise to do in a group but perhaps best suited to groups of people from one team or department. You could also to ask people to take away part of this exercise and give it some thought individually.
- ▶ For some organisations the 'statement of values' might be bound up in other statements – for example the Community Links Statement of Purpose (see inside front cover) incorporates the values in that it sets out how we will work. Other organisations have a simple and explicit list of values – for example the Furniture Resource Centre Group in Liverpool ([www.frcgroup.co.uk](http://www.frcgroup.co.uk)) list their values very simply as passion, creativity, bravery and professionalism.

## Books that make us think about values

### **The Ragged Trousered Philanthropists** – Robert Tressell

A powerful call to vote for a better future.

### **The Prophet** – Kahlil Gibran

Thoughtful and wise and persuasive without preaching.

### **Any Asterix book** – René Goscinny

All about being indomitable and sticking together through thick and thin

### **The Man Who Planted Trees** – Jean Giorno

A little book, with a big message that patience, determination and a life well lived can have an impact on countless others.

### **Change the World for a Fiver** – We Are What We Do

50 ways in which you, as an individual, can change the world with simple everyday actions.

### **A Call to Conscience: The Landmark Speeches of Dr. Martin Luther King Jr.**

He shows how words, spoken with dignity and passion, can change the world.

### **If Not Now, When?** – Primo Levi

About a group of Jewish partisans in the forests of Eastern Europe. Their lives are both terrible and inspiring but full of universal human activities as bickering, bonding and sharing stories.

### **Stig of the Dump** – Clive King

Because it's all about recycling ...

### **1984** – George Orwell

Because it made Asher think really hard about civil liberties

### **To Kill a Mockingbird** – Harper Lee

One of the first books many of us read (it's a GCSE set text) about the big theme of standing up for what you believe is right.

### **It's Not About the Bike** – Lance Armstrong

With individual determination you can overcome the odds. But with the support of your team you can be superhuman!

### **Oh the Places You'll Go!** – Dr Seuss

In typical Dr Seuss style, he assures us (and the young children we are pretending to read this to), that "You have brains in your head. You have feet in your shoes. You can steer yourself any direction you choose."

### **Long Road to Freedom** – Nelson Mandela

In our celebrity obsessed age the world's most famous man is not known for his physical appearance, for playing football or for making records or films. He's old and black and frail and he is famous for forgiveness.



## Exercise 3 Build your activity on your values

Here's an exercise to help people connect the values to the activity of the organisation.

Again, begin with your organisation's statement of values or your notes from the first exercise.

### Values in the real world (for groups, 60 minutes)

1. Put some big sheets of flip chart paper up around the room. You could have a sheet for each value divided into two sides (positive and negative) or you could make one side of the room for positive comments and the other for negative.
2. Give everyone pens (or post-it notes) and ask them to record their thoughts on the flipcharts
  - a. If these are our values, which do we really do well? Can we identify projects or elements of our work that really delivers our values?
  - b. If these are our values, which do we not do so well? Are there projects or other things the organisation does that don't really deliver our values?
3. When you have lots of comments and ideas written up, spend some time looking at the contributions and questioning / reflecting on them. Ask participants to discuss :
  - a. What factors make it hard for us to deliver our values in the real world?
  - b. What can we do about it?



- ▶ This needs to be a group discussion.
- ▶ Think about who you want to take part in this discussion. You might find it easier to start with particular groups, e.g. Trustees, senior management team, groups of workers, volunteers or service users. We found these discussions challenging!
- ▶ You could then bring people together in a mixed group to feed back to each other and discuss.
- ▶ Although this exercise will only take an hour, you will develop plenty more work as a result.



## Exercise 4 Build every activity on your values

This exercise builds on the work of Peter Senge, Chair of the Society for Organisational Learning, in his seminal book, *The Fifth Discipline*<sup>1</sup>. Senge suggests that:

- ▶ Beneath every event ...
- ▶ ... is a pattern of behaviour, which is supported by...
- ▶ ... a system, underneath which...
- ▶ ... lie our mental models (or our values)

This exercise turns that framework on its head and asks

- ▶ If these are our mental models or values ...
- ▶ ... what systems must we put in place...
- ▶ ... that will support and enable appropriate patterns of behaviour...
- ▶ ... that will deliver the event (or project or service) that best fits our values?

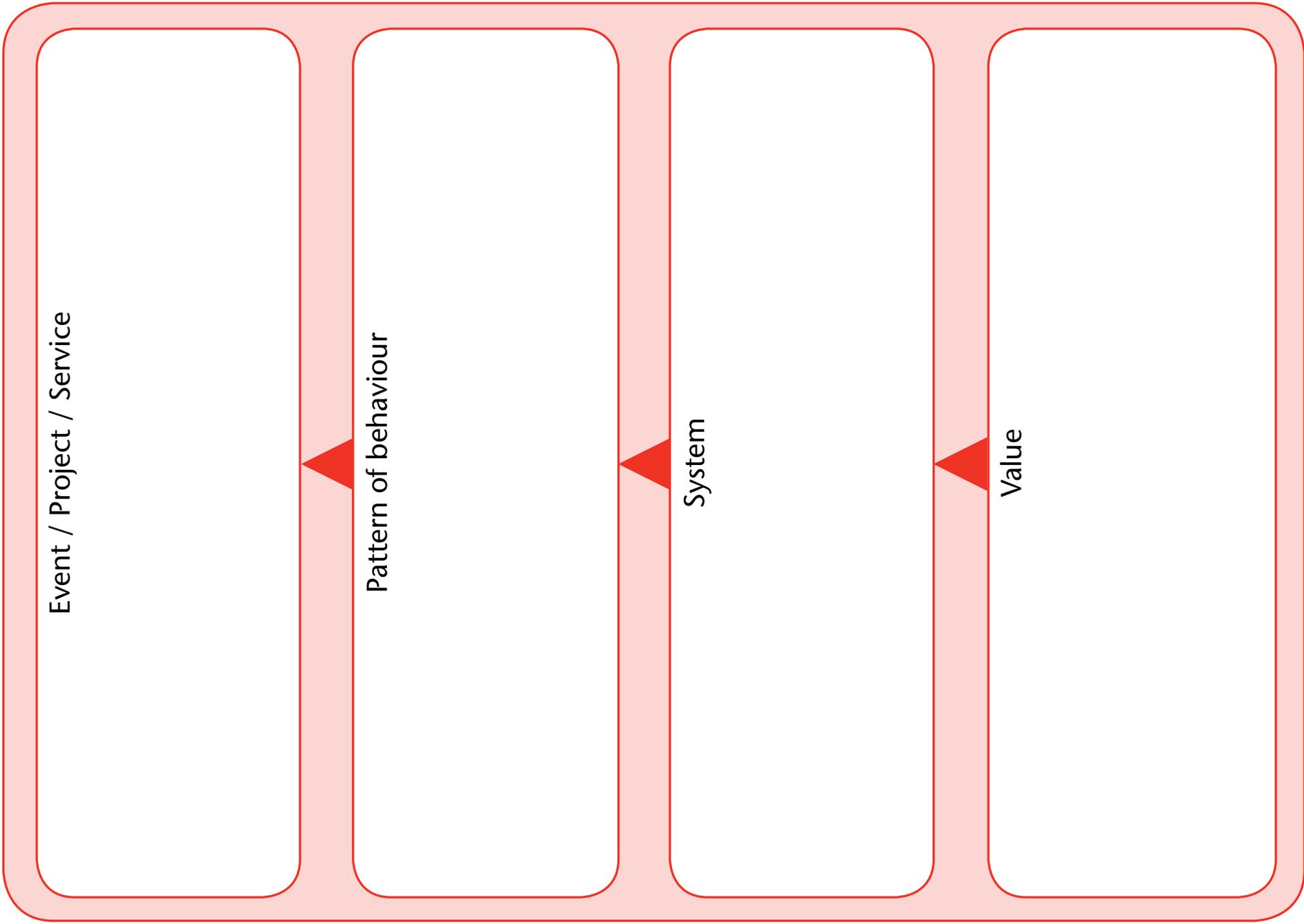
### Building on values (for groups, 30-60 minutes)

1. Give out a chart that looks something like the one on the next page.
2. Ask participants to fill in one of the organisational values in the bottom box. And then ask them to build upwards.
3. Ask participants to share their ideas.
4. Reflect and discuss.



- ▶ This would be a useful exercise for a strategic planning day or for a team away day. However, it's a fairly challenging session and would be most useful if you had already done one or two of the other exercises and your group were already comfortable with discussing values.
- ▶ Prepare an example from your own organisation of how participants might use the charts.
- ▶ This exercise is a good way of reflecting on the work you already do as you can look at which events (projects or services) are identified using this process and which aren't.
- ▶ It is also helpful in planning new projects.
- ▶ It will take 30-60 minutes depending on how many values you have and how you choose to run the session (individually, in pairs or as a whole group).

<sup>1</sup> Senge, P. (1990) *The Fifth Discipline: the art and practice of the learning organisation* London; Random House



## Moments in films that make us think about values

### **The Wild Angels**

Not necessarily for the hell raising, but just for the line 'We want to be free. We want to be free to do what we want to do.' Because this would be a good opening line for the next funding application.

### **Coach Carter**

Kay watched this on a long flight and was inspired by Samuel L. Jackson turning around the lives of young men.

### **Little Orphan Annie**

Because Annie's confidence and optimism, even when life is at its darkest, succeeds in teaching Daddy Warbucks that there is more to life than the ruthless pursuit of profit. 'And if tomorrow I'm an apple seller too, I won't need anything but you.'

### **Casablanca**

For the scene where Nazi officers are singing Die Wacht am Rhein in Rick's Bar and the resistance leader Laszlo, listening tight-lipped, finally strides resolutely over to the band, telling them: "Play the Marseillaise! Play it!" The band members look down, then up toward their boss Rick (played by Humphrey Bogart), who slowly nods to them and they play. It's a stirring moment of courage and defiance.

### **Bug Story**

Because the bugs get together to stand up to the wasps – and united they stand.

### **Strictly Ballroom**

It depicts the main protagonists as outsiders, excluded from the mainstream, who, through the power of their innovation, tenacity and passion succeed in overturning a staid and corrupt bureaucracy. And the frocks are nice too.

### **One Flew Over the Cuckoo's Nest**

McMurphy comes to the hospital as a rogue who seems to care about no one but himself and his boldness immediately signals a threat to the authorities, but he dedicates his time inside to empowering the other patients to 'make them men' again. McMurphy helps the other patients to respond much more positively than any therapy that the hospital prescribes, enabling them to laugh and be happy, stand up for themselves and live again.

### **12 Angry Men**

Because it just about sums up everything about being driven by your values and by standing up for what you believe in.

### **Erin Brockovitch**

Based on the true story of a small law firm which, fired by a sense of injustice and driven by obsessive attention to detail, challenges the practice of a Californian power company. It led to the largest settlement on record for a civil action lawsuit.

### **Ghandi**

The moment when soldiers brutally club the men and women who are, non-violently, attempting to make salt. As each is knocked back another relentlessly takes their place.



## Exercise 5 Measure your work against your values

We spend a lot of time providing monitoring information and evidence of the outputs we have delivered, but we rarely have time to think about the outcomes of our work, or to reflect on how we measure up against the high ideals we have set ourselves. There are a variety of tools that attempt to measure or prove the impact of the work of third sector organisations. Some signposts are identified in Section 4 of this report. But measuring your work against your values is a challenging thing to do. We have suggested two simple exercises here that will help you to begin.

This report identifies that the values are constant and enduring. We also know that many of the best third sector organisations are innovative, dynamic and pioneering. Being innovative involves taking risks and trying out new ways of doing things. And some of our best attempts to innovate will fail. But we can learn from our failures, perhaps as much if not more as we can learn from our successes. 'Good failures', even if they didn't work, are built on the solid foundations of our values.

In the current funding climate, it is hard to be honest about the things that don't go well. Why not set aside some time for projects or teams to reflect at the end of each year on the 'good failures'.

### Appreciating Failure (individuals or groups, 60 minutes)

1. Ask the group to identify what they have done differently this year / over recent years?
2. In terms of delivering our values, how did the new initiatives work? Be honest – is it possible to have delivered all the outputs but not really to have delivered the values? Why?
3. Spend some time 'telling the story' of the new project or initiative and understanding what really happened or is happening.
4. What can you learn? Identify what can be done differently now and what could be done differently next time
5. How will you share this learning across the organisation? Is the learning for internal consumption only or can you share it with other practitioners?



- ▶ The organisation will need to make time and space available for this kind of reflection. If you want participants to be honest about what hasn't worked very well you will need to make sure that the session feels safe e.g. information is for internal use only, managers listen but don't criticise.
- ▶ The best source of information for this exercise will be the frontline workers. Could you find a way of embedding these discussions in supervision sessions?
- ▶ Remember that this discussion is about delivering the values – so write up your values on flipchart or have them printed to hand out. Make sure the focus stays on the values
- ▶ Use this exercise to help projects or teams to plan what they might do differently in future.
- ▶ Share this learning internally across the organisation. Use it to align future work more closely with your values.

## Places to visit that make us think about values

**Speakers Corner, Hyde Park, London** – a great place to dissent!

**William Beveridge's grave in Throckington, Northumbria** – to stand there and reflect on the achievement of universal social security.

**William Wilberforce's Chair in Keston, Kent** – a bench in the woods that Wilberforce is supposed to have been sitting on when he decided that slavery must be abolished. A momentous place to sit!

**Any Museum that is free** – there's always something to inspire, not least the free entrance.

**Your local War Memorial** – wherever you are in the country. Some include the names of those who volunteered from the Commonwealth. Polish War Memorials in the UK (there's one at the beginning of the M40) commemorate those who lost their lives in the Polish Free Army and Airforce. Next to the London Eye on the south bank of the Thames is a statue built as memorial to the 2,000 men and women of the International Brigades who went to fight fascism in Spain between 1936 and 1939. The statue has an inscription which reads *'They went because their open eyes could see no other way'*.

**Your local Carnegie Library** – Andrew Carnegie built 600 beautiful libraries across the UK saying “a man who dies rich is disgraced.” The very act of collecting the sum of human knowledge in book form is amazing.

**Lloyd George's house in Wales** – a tiny house in a tiny village. His body came back to here to be buried and a boy he was at school with (who had never left the village) made his coffin.

**Kinder Scout outside Manchester** – site of the mass trespass which led to the foundation of the Ramblers Association.

**Iron Bridge in Telford or the Clifton Suspension Bridge in Bristol** – the ambition of a big idea and the confidence to actually do it.

**Postman's Park, City of London** – inside the tiny park are 34 plaques to people who have lost their lives trying to save the lives of others.

**Longstone Lighthouse, Farne Island, Northumberland** – from which Grace Darling rowed out to rescue 9 shipwrecked sailors in 1938 – which led to the founding of the RNLI

**Toad Lane, Rochdale** – where Robert Owen founded the first co-operative

**Tolpuddle in Dorset** – sit under the tree on the common where the Tolpuddle martyrs held their meetings – the start of the trade union movement

**The Community Links building at 105 Barking Road, Canning Town, London** – come and visit! We're based in the old West Ham Public Hall. Kier Hardie was selected as an MP here, Bertrand Russell and Sylvia Pankhurst both spoke here, and the GMB Union was founded here by Will Thorne. It's an inspiring building to work in.



## Exercise 6 Measure your work against your values

Organisations review their progress at the end of each year in their Annual Reports. But producing a CV challenges us to look back over the lifetime of the organisation to see what we have learned and how we are building on that learning.

### An organisational CV (60-90 minutes)

1. Imagine that the organisation's values are a job description or person specification. Imagine that your organisation wants to get the job of delivering those values. You need to demonstrate with practical examples how your organisation puts each of the values into action.
2. Write each value on a piece of flipchart and give everyone a pen or pack of post-it notes. Ask them to write up their ideas.
3. If lots of different ideas are contributed, ask people to vote for the best ones.
4. Write the CV that will get your organisation the job.



- ▶ This exercise will benefit from input from people from across the organisation at all levels. It might be a larger group than usual, perhaps an open workshop.
- ▶ Remember that on a CV, it's useful to show a track record over a number of years rather than lots of examples from the previous year.
- ▶ For the voting, you can give each person 3 sticky dots and ask them to vote for their favourite ideas by sticking the dots on.
- ▶ Did you find that you had lots of examples under one value and very few under another? What does this tell you about delivering your values?
- ▶ This workshop could take up to 2 hours depending on how many values you have and how many people attend.
- ▶ You might then decide to produce a real CV from this exercise. Community Links produces a CV every few years. You can see the latest version at [www.community-links.org](http://www.community-links.org)
- ▶ Once you have produced your CV, use it as a powerful communications tool that will get people talking about your values and understanding how you deliver them.

## Quotations to inspire

Never doubt that a small group of thoughtful committed citizens can change the world. Indeed, it is the only thing that ever has.

Margaret Mead, US anthropologist, 1901 – 1978

Some men see things as they are and ask ‘why?’  
Others dream of things that never were and ask ‘why not?’

George Bernard Shaw, Irish dramatist & socialist,  
1856 – 1950

Be the change you want to see in the world.

Happiness is when what you think, what you say, and what you do are in harmony.

Ghandi, Indian leader, 1869 – 1948

A different world cannot be built by indifferent people.

Peter Marshall, US clergyman, 1902 – 1949

Injustice anywhere is a threat to justice everywhere. We are caught in an inescapable network of mutuality, tied in a single garment of destiny. Whatever affects one directly, affects all indirectly.

Martin Luther King Jr., US black civil rights leader  
& clergyman, 1929 – 1968

We must learn not to disassociate the flower from the root, for the flower that is cut off from its root fades, and its seeds are barren, whereas the root, secure in the earth, can produce flower after flower and bring their fruit to maturity.

Kabbalah

There is a vitality, a life force, an energy, a quickening, that is translated through you into action.

Martha Graham, US choreographer & dancer, 1893 – 1991

All over the place, from popular culture to the propaganda system, there is constant pressure to make people feel that they are helpless, that the only role they can have is to ratify decisions and to consume.

Noam Chomsky, US activist & linguist, 1928 –

It is easier to fight for one's principles than to live up to them.

Alfred Adler, Austrian psychiatrist & psychologist, 1870 – 1937

Open your arms to change but don't let go of your values

Dalai Lama, Buddhist leader, 1935 –



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## Living Values reports the findings of the Community Links Collaborative Inquiry into the Values of the Third Sector. The Inquiry set out to investigate:

- ▶ What are the values of the third sector? Are these values shared across the sector?
- ▶ Are these values unique to the sector?
- ▶ Are these values under threat?
- ▶ What can we do to protect these values? What can we do to promote and extend them?

*"A very interesting exercise happening at an excellent time"*

Nicolas Deakin, Chair of the influential  
Commission of the Future of the Voluntary Sector

*"The sense of immediacy and authenticity makes for  
an unusually compelling read"*

Stephen Cook, Editor: Third Sector Magazine

This report includes inspiring examples of organisations putting their values into action, and a toolkit of practical exercises to get people talking about values.

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