



# OUR VALUES

## Team Formation Facilitation Guide

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## Meeting Overview

The goal of the Our Values Team Formation Facilitation Guide is to provide a pathway for team leaders or outside facilitators to walk alongside a team as they get to know each other and begin to define team values. The outcome of successful facilitation will be the foundation for team culture and honoring each others' uniquenesses. This meeting requires a safe space for each person to share transparently and to clearly communicate their personal values. However, the goal is more than self- and other awareness. Our intent is to facilitate to team values and clear commitment to honor our newly forming team. Our Values should provide new learning directly impacting how we can work effectively together long-term.

Our Values will highlight some of our similarities and some of our differences. As one guiding this process, remember each person is valuable to the team, and each value shared is rooted deeply in the core of who we are. This is not an activity to change values, or to highlight any one person's role, values, or voice more than any other.

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## Meeting Essentials

1. **Engaging:** Begin with an ice-breaker, getting everyone talking, and then for the senior leader in the room to provide context for the meeting (why we are embarking on this journey together)
2. **Sharing:** Create space for each person to share their values.
3. **Reflecting:** Allow the team to respond and reflect on what they've heard and learned. Discuss the shared team values that will make you successful.
4. **Discerning:** How will we try to use the information we just learned? How will it make us a stronger team?

## Meeting Flow

### Engaging – Why are we here?

To begin the meeting, welcome everyone and thank them for the investment of time they devoted to completing the Our Values assessment. To begin the discussion, ask the following questions:

Discuss:

*When was the last time you used the phrase “people should...” or “it’s the right thing to do” or “that’s the right way to think about it...”?*

*What were you discussing, and why did you feel strongly about that?*

Depending on how new the team is, additional time should be given here to learn more of a person’s story.

Allow people to share what they hope to experience through the process. Capture the discussion on flipchart or another way to make it visible to all.

### Aligning - What are Values?

Values are at the core of who we are. They create motivation; the drive to behave in a certain way.

They come from the pain, growth and excitement we have experienced and are rooted in our deepest convictions.

- ❑ **Values defined:** That which is highly important or vital to me. The things I value are those which define the way I live my life, share in relationships, or fulfill my work obligations. It is a person’s principles or standards of behavior; one’s judgment of what is important in life.
- ❑ **Where do they come from?** Our values are woven through years of experience, our culture and upbringing, and also tied to pain or joy in one’s history. They are shaped by our religious practices, our view of self and others, and our lifelong learnings.

Values drive behaviors. However, all values may not be equally valued in team settings. Part of the hard work as a facilitator or team leader is to discern what is an outlier that is ok, and where is there a value that is needed for elevation or greater prominence in the team.

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## Reflecting – What are your Personal Values?

Looking at our Highest Values will create a positive environment for us to feel heard and seen in a new way. Providing space for each person to adequately share their values is an important piece of this activity. Do not cut this section short. If time constraints are a factor, limit the number of HIGH or LOW values that are shared (example: HIGH 3 and LOW 3).

1. Allow each person to share their HIGHEST values, and how they see this benefitting the team.
2. Reflect on 'themes' of what they are hearing. Capture these in a way that it is visible for the team.
3. Make everyone's HIGH values visible to the team. (Note: this is provided in the Composite Report, and can be downloaded into Excel). Look at it briefly, but do not try to draw conclusions or shared understanding from it yet.
4. Introduce LOW values. For most, this has never been a part of a values conversation. LOW values are either aversions or blind spots. They are intentionally neglected or points of potential rub when others may have a value as one of their HIGH. It does not predetermine conflict or frustration, rather it is a point of needed understanding and conversation as we grow as a team. In team formation, it is space where we can proactively have conversations which may save us heartache later in our team development.
5. Have each person share their LOWEST values. Have them share how they have observed this impact their relationships or work previously. Ask for examples as much as possible.
6. Reflect as a group on what they learned about LOW values and how they impact how we behave. Discuss the value of having this conversation in team formation.
7. Make everyone's HIGH / LOW values visible to the team.
8. Discuss where you are seeing overlap and connection between your HIGH values. This can be common components of the values, categories of the values, or impact to the team. Here it is important to allow people to begin to share where they feel the team's culture (or shared values) is most readily seen. Also, if there are organizational values to be considered, they should be incorporated at this point.

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## Building – What are Our Values?

*Note: For some groups, this may be a natural breaking point to split sessions.*

Now that individuals have felt heard and seen, we can begin to engage in the conversation around Our Values as a new team.

1. Make everyone's HIGH / LOW values visible to the team.
2. Discuss where you are seeing overlap and connection between your HIGH values. This can be common components of the values, categories of the values, or impact to the team. Here it is important to allow people to begin to share where they feel the team's culture (or shared values) is most readily seen. Also, if there are organizational values to be considered, they should be incorporated at this point.
3. Discuss what values together will allow you to be successful in your goals. If goals haven't been established, use the values to define how you will fulfill the team / organization's mission.
4. Capture the themes and ideas from the conversation and come up with shared values that will create the culture you aspire to have in your team. Discuss what could be missing, and discuss consolidating. Best practice will be to narrow to no more than 5 core values for your team.

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## Leaning In – Where do we have potential for misunderstanding or conflict?

*Note: For some groups, this may be a natural breaking point to split sessions.*

As one guiding the conversation, this is the riskiest portion of the conversation. Your goal in this conversation is the surface real examples of challenges the team members have had in other life experiences, and connect the dots to the values each person was operating from as they engaged in the interaction. If the team is currently experiencing significant conflict or if they have not yet formed enough trust, DO NOT have this conversation. It will exacerbate the challenges, and likely lead to greater frustration or ‘walking on eggshells’ to not offend or hurt others. Instead, in case of early conflict, use the Our Values Conflict Resolution Guide. If the team does not yet have enough trust, wait. This portion can be facilitated 1 to 2 months after the other sections if needed.

1. Introduce this section, reminding the team of why we are engaging with Our Values: team formation.
2. Ask someone to share an example of a time where there was misunderstanding or frustration that they experienced. If you are the team leader, ask an emotional leader, or seasoned person on the team to share ahead of time. If you are an outside facilitator, ask the team leader to share.
3. Allow 2 or 3 people to respond to the example with which values they felt were potentially exhibited in the episode. Always allow those who are a part of the example to share firsthand their experience and their values.
4. Go through 2-3 examples from different people. Use the same process of sharing by a person, reflecting by the same person, and responding by 2-3 others in the group.
5. Pull out the narrowed list of Values where individuals on the team have HIGH and others have LOW. Discuss how these values could potentially impact team effectiveness.
6. Allow everyone to review their list and reflect personally for a minute on this question:  
Is there a value you have, that doesn't feel like it has traditionally been valued in other teams?  
Is there a value you have that you feel is particularly important to you being an effective team member?  
This is not a time for rebuttal or response, but potentially clarification if absolutely necessary. Otherwise, it is a time to listen, and thank the individual for sharing.
7. Thank everyone for their transparency and honesty in this section. Provide a break at this point, and let everyone know that we want to come back and look at the “so what” of this.

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## Discerning – What is the team impact of understanding Our Values?

For this final section of the experience, we want to make the team values and the team transparency practical. We've discussed our values, our new team values, and where we feel we may have challenges. Now, as a team, we get to decide what we do with this information.

1. Allow team members to capture 2 take-aways for the team from the experience so far. Have them get into groups of 2-4 and share what has been important.
2. Shift groups to new groups of 2-4 and pose the question: What impact does this information have on how we want to function as a team?
3. Now ask "How can we practically incorporate this learning into our work?" Capture the brainstormed ideas visibly to the team. Allow the team to discuss the ideas once everyone has shared.
4. Narrow to 3 practical actions that are visible and where team accountability can be instilled to practice the new behavior.

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## Troubleshooting / Pitfalls to Avoid

- **Accuracy / I answered it wrong**

Each person was given the opportunity to go through the assessment looking at each of their answers. If you feel it doesn't reflect you, perhaps think about why you answered the way you did, and consider which of the 5 high and low values may be most reflective, even if you feel they are incomplete.

*Question: How would you have liked to answer it? What mindset would you have rather had as you took the assessment?*

- **I don't like low**

Low values do not indicate an error or gap in you as an individual. It simply creates a space where – in the context of team—we should pay attention. It is an indicator of something being “not as important” or “still important, but not as important as the others.” Again, these are not weaknesses in you, it is values that do not rise to the top for you.

*Question: What is it that most concerns you about the lows? Where do you see value in understand lows for others? What value could there potentially be in learning more about your low values?*

- **I don't want to participate**

The why is always important when we engage in team development activities. Though it may not be a preferred activity, it has the potential to enhance our team, and allow us to be more effective as we learn about each other. Your desire to not engage will likely come through in values you may have chosen (high or low) and it would be helpful for the team to understand that as well.

*Question: What is it that makes an activity like this challenging for you? How could we adjust, or how could I (as team leader) support you as you participate?*

- **That's only when I'm at home**

Values transcend any single space in our lives. They will be highlighted potentially very differently based on the relationships around us, but it is very unlikely that they would be completely different. Some values, however, may not be honored in a given team context. That is actually extremely valuable for individuals to share if they are comfortable. It requires a safe environment.

*Question: What makes that a value that feels different for you in different spaces? How could that potentially impact our team? What would be important for us to understand about the*



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*value?*

- **Under-talker**

Sharing minimally is completely acceptable. Make sure engagement and questions are given 'space to rest.' You are discussing very sensitive and personal things. Adding information to the team discussion allows the team to share with you in the value, and honor that value in the team interaction.

*Question: How is the team interaction feeling to you? What seems valuable for the team to know about the value for you? Tell me more.*

- **Over-talker**

Over-talking can be indicative of a variety of things in a group context: someone is very excited and engaged in the information and what they are learning personally; someone is feeling heard, and excited to have opportunity to be valued; someone is NOT feeling heard on a given topic or point that is particularly important to them. It is important to understand why the person is sharing, and for them to understand the potential impact on the team (i.e. them sharing means someone else is not sharing).

*Question: Thank you for sharing. How do the rest of you feel about that? What are we demonstrating even now about our values by our interactions? How can we best make sure all voices are equally heard in our conversation today?*

## Sample Agenda

TOPIC	NOTE	3 Hr MEETING	5 Hr MEETING
Engaging	Introduction, icebreaker, why	15 min	30 min
Aligning	Values definition and foundations	15 min	30 min
Reflecting	Group sharing of Highs / Lows	60 min	90 min
Building	Group discussion creating team values	45 min	90 min
Leaning In**	Group discussion about Mixed Values	15 min	30 min
Discerning	Group discussion about implications	30 min	30 min

\*\* can be postponed to separate meeting once team has established trust.

## Appendix of Additional Resources