

## Benchmark 5: Develop Core Values for Your Ministry

### Developing & Adopting Core Values for Your Ministry

For Benchmark 5, you will use the following step by step instructions to develop core values for your ministry. Since it is referred to repeatedly, following is the quote shown in the TiU 2.0 notebook from Richard Barrett's *Building a Values Driven Organization—A Whole-System Approach* (italics added below to highlight key concepts):

“The purpose of establishing a set of values is to create a *code of behavior that builds a cohesive culture* and supports the [ministry's] mission. The values provide a framework within which every member of the organization can operate with *responsible freedom*. When individuals fully embrace the organization's values, *everyone becomes mutually accountable*. Values that are shared *build trust and create community*. They also create *cohesion and unity*.

“Values are “*rules*” for living and decision making. They are deeply-held beliefs that a certain way of being or a certain outcome is preferable to another. Values are externally demonstrated through behaviors. The phrase “*walking the talk*” means that there is no discrepancy between an individual's values and behaviors. *Values “talk” while behaviors “walk.”* An organization's values make an open declaration about how it expects everyone in the organization to behave.

“Strong communities are characterized by sincere friendliness and the ability to pursue shared objectives quickly and efficiently. The strength of a community depends on the commitment of its individual members to live by the shared values. *To create a strong [organizational] culture, the values must be lived by everyone, most importantly by those in leadership positions. A strong core culture can be created only when there is alignment between values and behaviors [throughout] the organization.*”

You can see from this quote why core values are important and what benefits are gained in a spiritual community from explicitly stating core values and living and working with these core values in consciousness. Some examples of core values are:

- Abundance
- Compassionate
- Courageous
- Creative
- Enthusiastic
- Flexible
- Generous
- Grateful
- Inclusive
- Integrity
- Joy / Joyous
- Love / Loving
- Open / Open-minded
- Playful
- Spirit-Led / Spirit-Filled
- Spiritual / Spirituality
- Stewardship
- Service
- Transformation
- Truthful
- Wise
- Whole (Wholeness, Holistic)

## Step 1: Hold a congregation-wide discovery meeting to identify the core qualities of your spiritual community

Certain core qualities are already at the heart of your spiritual community. Step one starts a process of first, making your core qualities explicit; second, developing your core values; and third, intentionally living the core values. This will enable your ministry and congregation to more consciously and intentionally build spiritual community and relationships together as they “walk the talk” of the core values.

It all begins with a congregational discovery process. It is important to create an opportunity for the congregation to come together specifically for this purpose. Start by scheduling a three-hour congregation-wide workshop that invites participants to call forth the core qualities of your spiritual community. Use a sign up list or other tool that will allow congregants to indicate whether they will participate so the facilitator and others involved in set-up will know how many people will take part.

The meeting process will require a facilitator to volunteer or be assigned before the work begins since the facilitator must be fully familiar with the process before facilitating. It is important to stay with this process in order to complete it in the time allotted and ensure congregants’ inputs are welcomed and received. The facilitator can also act as the scribe to capture inputs from the participants on flip charts or a volunteer can be requested to do it. (Note: It is important that the scribe writes clearly, very accurately and fairly quickly to capture congregational inputs so as to honor them, while not significantly slowing the process down.)

Once the venue is determined, the room can be set up in any way that will make the participants comfortable and able to see the facilitator. (Of, course, you may use the sanctuary and in that case, the seats may not be movable.) It is important to have the following items on hand for the workshop:

1. Flip charts (with self adhesive on the back, if possible, or tape, if not) and several markers that write clearly so inputs can easily be seen
2. Pens and index cards (3X5 size)—one for each participant, to be handed out before starting the meeting
3. Paper for the participants (at least one sheet for each)
4. Sticky dots for voting (five per participant)

The meeting will begin as the minister, licensed Unity teacher, or chaplain leads the group in meditation/prayer, since this is essentially a process of spiritual discernment.

Then, the facilitator will follow these steps:

1. Orient the participants to the concept and purpose of core values using the Barrett quote above.
2. Ask the participants to write down the five people they admire most (living, not living or fictional characters) and focus on this question for a few minutes: “What three qualities or ways of ‘being’ do you value most in each of these five people?” (Examples are: patient, compassionate, loving, joyful, wise, etc.) Request that they specifically focus on qualities or attributes these people demonstrate. These are essentially states of “being,” (e.g., flexible), rather than “doing” (e.g., teaching or praying). Have them circle the three qualities that they consider the most important or to which they have the greatest attraction. Allow no more than 5 minutes for completion of this part of the work.
3. Now ask the participants to consider: “What one quality of being do you personally value most?” Have them write this quality on the index card and request that they also write one (1) sentence explaining why this is so. Allow no more than 5 minutes for this task.
4. Invite the participants to stand and share the one quality they value most, along with the sentence they wrote to explain it, with three other people in the room, and then return to their seats afterward. Allow no more than 5 minutes for completion of this task.
5. Ask the participants what they noticed or experienced during the sharing. Allow them to briefly talk about their experience for 5 minutes. Especially focus on core qualities they identified.
6. Give the following introduction and then ask the question below:
  - a. “Just as we looked at the qualities that are most important to us personally, we will now look at the qualities that are most important to us within this spiritual community. We are looking for qualities that are already at the heart of our spiritual community, such as love, compassion, inclusiveness, etc. This is not about things we are **doing**, such as education or teaching, prayer, meditation, etc., but rather how we, as a community, are **being**. These are qualities or attributes we may already be demonstrating and that we want to demonstrate in a greater way.”
  - b. Invite a minister, spiritual leader, licensed teacher or prayer chaplain to lead a period of silence (no more than two to three minutes) to help people center again.
  - c. Then ask them to focus on the following question and be prepared to answer when you ask them to: “In silence now, on a piece of paper, please answer the following question in single words or two-word phrases: (Pause) As a spiritual community, what *one* attribute or quality of **being** is most important to us? It

is possible that this quality may already be demonstrated within our spiritual community in some way.” Repeat the instruction and question in quotes above. (Also, have it already written on a flip chart for all to see.) Ensure everyone understands. Let them know before they start that everyone will share their answers when all are ready to speak. Then, give them three to five minutes to consider this question and record their answer on a piece of paper. They may have more than one answer, but they need to choose the one that’s most important within the spiritual community.

- d. Once the time is up, ask if the group is ready to proceed (everyone has finished writing and decided upon one quality). When they are ready, reiterate the question and then ask for their responses. Capture (or have the scribe capture) all the answers on flip charts and hang them on a wall together. (Note: If anyone gives an answer, such as education, meditation, or prayer, that does not represent a quality of **being**, capture it on a separate flip chart. Tell the participants that those words on the separate flip chart(s), which really represent “doing” rather than “qualities of being.” will be considered during the development of the core values. Hang this/these flip charts on a different wall together.)
7. Once all the spiritual community’s core qualities (qualities of being) are captured on flip charts and hung together on a wall, give each participant five sticky dots and ask them to vote for the five core qualities that they believe are most representative of your spiritual community. (They must vote for five *different* core qualities. No stuffing the ballot box!)
  8. When everyone has voted, give the participants a ten-minute break and tally the scores. Determine the top five core qualities, according to voting, and the next three in order of the tallied votes. Write the top five on a new flipchart, draw a line and then write the next three. (The reason for capturing the next three is that they may inform the development of the core values, especially if they are similar to any in the top five.)
  9. When the participants return from the break, show them the top five core qualities. Let them know that they will now get to give their inputs on these core qualities. Quickly break the group into smaller teams (no more than 10 -15 people in each, depending upon the overall size of the group). Ask each team to choose a recorder to capture their answers (someone who writes clearly). Have each team conduct a brief discussion on each of the top five core qualities. For each core quality, the teams should answer the following questions. (Allow no more than about 5 to 7 minutes for the discussion on each core quality and act as the time keeper to help them complete the work on time.)
    - a. What does [fill in the core quality here] mean to us? How would we define it?
    - b. Why is [fill in the core quality here] important to our spiritual community?

10. Once each of the five qualities are discussed and the answers are captured, bring the participants back together and ask them to briefly share anything about their experience during the core qualities discovery process (take about 5 minutes). What did they notice or learn?
11. Once the sharing is complete, briefly outline the rest of the steps that will be taken to develop the core values (see below).
12. Thank everyone who attended and participated in this important work, and then ask someone to close with a prayer and/or do some other brief closing of your choice.

## Step 2: Capture the congregation's meeting results

It is critical to capture the results of the congregational meeting. The facilitator should save the flipcharts after the meeting. The most important flipchart is the one with the final core qualities resulting after participant voting. The flip charts used for the voting should be stacked right behind it. The facilitator should then stack the flip charts containing the items that were not considered qualities of “being,” but rather “doing.” (These flipcharts can be used for reference during the rest of the work.) The facilitator should also capture all teams' inputs to the questions in Step One, item #9 above (collated by the core quality they address).

A staff member or volunteer should then type a document containing the sheet with the top five core qualities and the three qualities just below the top five (according to the voting), along with the congregational teams' inputs for each core quality from the discovery meeting. These will be needed for the next steps. There is no particular format for this, but it is important to ensure that this information is accurately transcribed for later use. This work should be completed shortly after the meeting is over. You are welcome to make it available to anyone who wants it, but it is mainly meant for use in the next step. (Note: The typed document and flip charts that did not get typed should be preserved and presented to the people in Step 3.)

## Step 3: Identify a Core Values Team to discern the core values and draft meaning and rationale statements

This step is usually experienced as highly rewarding and even transformational for the participants. They will be involved in spiritual discernment of the core values that embody the qualities or attributes at the heart of the ministry and of its people.

The ministry leadership (i.e., minister/spiritual leader and board president) will organize a Core Values Team by invitation and ask one team member to volunteer to be its leader. This team usually consists of the following:

- two board members; two staff members, including a minister or spiritual leader (if possible) **or** a staff member and a licensed teacher (if available); and three congregants
- three board members; one staff member (usually the minister or spiritual leader); and three congregants, if the ministry is small and staff members are limited.

It is important to keep the number to approximately seven people for ease of working and scheduling meetings. The staff- and congregant-team members should be people who have been with the congregation for long enough that they understand the qualities that are at the core or heart of the ministry and its congregation.

The team leader is accountable for scheduling meetings and keeping the work on track. Before the team meets, the members should be given copies of this benchmark to review, as well as the typed results of the congregation-wide discovery meeting and any other flip charts that have been saved from that meeting for their review and use. Once the Core Values Team is assembled for their first meeting, they should open the meeting with prayer and then review the quote from Richard Barrett’s book above that describes the impact of their work, as well as the core values format and example that follows.

When the team is prepared as described above, they will again review the top five core qualities, along with the next three, as voted upon during the congregation-wide discovery process. (Note: Sometimes the three that did not make it into the top five are related to one or more of the top five and may actually support the work of discerning the core values.) The team leader should have these written on a flip chart for the meeting to enable easy review.

The team will then sit in the silence and consider the core qualities that were identified. They will spiritually discern, through silent meditation, the spiritual community’s core values (qualities of being). After sitting in the silence, the team may discern that the top five words are actually the core values of the community. However, sometimes the team may see a subtle distinction that fits the community better. For instance, one of the five core qualities may be “Prosperous;” yet in their spiritual discernment, they may see that “Abundance” is more descriptive of the core value that is really at the heart of the spiritual community. This may be a core value that could be developed more consciously and intentionally as a way of being within the community.

Once the team discerns the five core values through silent meditation and discussion, they will draft “meaning” and “rationale” statements for each of the core values using congregational inputs as appropriate (see the numbered footnotes below for directions). Here is an example:

## **Core Value and Its Meaning**<sup>1</sup>

### ***Spirit Led***

We turn within to Spirit for guidance and active communication.

## **Rationale**<sup>2</sup>

We create order, peace and harmony in ourselves and others when we align our daily actions with Spirit's guidance.

### **Footnotes:**

<sup>1</sup> The meaning is a statement of what the core value means to the spiritual community. It is a definitional statement answering the question, "What does this core value mean to us?" It is developed using any applicable input from the congregational discovery meeting. It should be only one sentence long so it can be easily used and remembered.

<sup>2</sup> The rationale is a statement that answers the question, "Why is this core value important to our spiritual community?" Again, it is developed using any applicable input from the congregational discovery meeting. If there is difficulty answering this question, the value you are dealing with is probably not a core value for your spiritual community. More discernment may be necessary.

## **Step 4: Share the draft of newly developed core values with congregation for feedback**

After the Core Values Team completes its work, the congregation can be invited to another meeting, for instance after a Sunday service, to be introduced to the core values that have been drafted on their behalf by the Core Values Team. There should be a facilitator for this meeting. (The Core Values Team Leader or another facilitator could lead the meeting.) The core values, meanings, and rationales should be presented, and the congregation should be asked for their questions and feedback about the core values as drafted. Questions can be answered by the Core Values Team Leader. All feedback should be captured by a scribe who will write it on flip charts so that all feel heard and honored. (Note: It is important that the scribe writes clearly, very accurately and fairly quickly to capture congregational inputs so as to honor the participants' inputs, while not significantly slowing the process down.)

It is essential for the ministry leaders (minister or board president) to share next steps with the attendees (see remaining steps below). This will give the congregants an understanding of steps the ministry will take to increase their understanding of and commitment to practice the ministry's core values.

At the end of the meeting, the congregants should be asked whether, in general, they are willing to work together to begin to live these core values in their spiritual community. You may also want to ask how this commitment and practice might impact their daily lives.

### Step 5: Incorporate congregational feedback

The flip charts containing feedback from step four above are then given to the Core Values Team for incorporation, as appropriate, into the core values meaning and rationale statements. The team may, again, spiritually discern the changes needed, if any.

### Step 6: Share completed core values with the congregation

Once the congregation's feedback is integrated and the core values work is finished, there are many ways to introduce the core values and begin to integrate them into the consciousness of the ministry and its people. One way used by many churches is to do a Sunday lesson series on the core values, one per week. Some churches have also interspersed this with small group work during the weeks in between the talks to enhance understanding and commitment. This can be facilitated by creating three or four questions about each core value for discussion within the small groups.

Ministries have hung banners containing the core values in the sanctuary or other locations, and one even created a unique wall hanging that lists the core values in a very artistic way. Small cards with the core values and their meanings printed on them have been created so the congregants can carry them and continually familiarize themselves with the core values. The possibilities for increasing congregational awareness, understanding, and commitment are only limited by your creativity. Some ministries have set up a small team that comes up with creative ideas for core values integration into the ministry.

There are many ways to continue to fully develop the understanding of each core value. The minister/spiritual leader can support people in internalizing the core values by linking their lessons or talks back to one or more of the core values whenever possible, and services may include the opportunity to recite the core values meaning statements. At every opportunity, all communications should include the core values. The core values can be posted on the ministry's website and included in newsletters, Sunday bulletins, and other communications within the ministry.

In addition, core values and their meaning statements can be recited together in the beginning of board meetings and other group/team meetings within the church to support the creation of sacred space for the meeting. This will enable decision making in accord with your core values.

The board (and other groups/teams) may also want to choose one core value at the beginning of each meeting and have a brief discussion about its meaning and how it is manifesting in their lives and within the spiritual community. They may also want to focus on the same core value briefly at the end of the meeting, asking how they have demonstrated that core value during the meeting. Again, when thinking of ways to fully develop the understanding of each core value, the possibilities are endless. Just use your power of creativity, and you will find many ways to deepen the understanding and commitment to practice the core values.

### **Step 7—Optional: Create ministry action statements and individual behaviors for each core value to support the ministry and congregants in living the core values.**

This step is optional. It fully completes the development of all aspects of the ministry's core values. (Note: This step is expected to be a separate benchmark in Thriving in Unity 3.0 next year.) This is additional work the Core Values Team can be asked to complete on behalf of the congregation.

To enable everyone to “walk the talk” of the core values, it is important to develop actions that the ministry, as an organization, will take to demonstrate the core values, along with individual behavior statements that congregants will agree to practice.

If your ministry chooses to fully develop the core values at this time, the Core Values Team will complete step three (meaning statements and individual behavior statements) and step seven (ministry action statements and individual behavior statements). See the following attachment for an example and directions. (A four-column Excel spreadsheet is a good tool to use to document this work.)

Once the Core Values Team completes steps three and seven, the core values are fully developed (in draft form). Then, steps four through six are completed as indicated above.

This process will support your ministry in creating a set of core values that can transform your spiritual community to the extent the ministry and its people practice its core values. It also has the potential of transforming the lives and experiences of people participating in it as they walk the talk of your core values together.

If there are any questions about these steps, please do not hesitate to call Susan Beck at the Association home office. She will be glad to respond to your questions and suggestions.

## Sample Core Values (Step 7 Attachment)

<b>The Core Value and Its Meaning<sup>1</sup></b>	<b><u>Rationale</u><sup>2</sup></b>	<b><u>Ministry's Actions</u><sup>3</sup></b>	<b><u>Individual Behaviors</u><sup>4</sup></b>
<b><i>Spirit Led</i></b> We turn within to Spirit for guidance and active communication.	We create order, peace and harmony in ourselves and others when we align our daily actions with Spirit's guidance.	[Ministry's name] begins all gatherings with prayer and meditation.  [Ministry's name]'s Board of Trustees sits in the silence before major decisions are made.	I have a daily spiritual practice that keeps me conscious of Spirit at work in my life.  I take life's challenges and celebrations into my prayer practice.
		[Ministry's name] teaches spiritual principles and practices, such as meditation and prayer, to help adults and children cultivate their communion with Spirit.	I complete classes and workshops that support my spiritual growth.

**Footnotes:**

1. The **meaning** is a statement of what the core value means to the spiritual community. It is a definitional statement answering the question, “What does this core value mean to us?” It is developed using any applicable input from the congregational discovery meeting. It should be only one sentence long so it can be easily used and remembered.
2. The **rationale** is a statement that answers the question, “Why is this core value important to our spiritual community?” Again, it is developed using any applicable input from the congregational discovery meeting. If there is difficulty answering this question, the value you are dealing with is probably not a core value for your spiritual community. More discernment may be necessary.
3. The **ministry’s actions** are statements that answer the question, “What will the ministry do to clearly demonstrate a practice of this core value?” Three or four action statements are sufficient for demonstration, and they must be action-oriented, rather than just a statement of principle. It is important to start each statement with the name of the ministry to indicate that it is an organizational action implemented by someone, a group or team on behalf of the ministry as a whole. The ministry must implement these actions to be in alignment with the core values.
4. The **individual behaviors** are statements that indicate how individuals within the spiritual community will “walk the talk” of the core values. They are individual actions to be taken by the people. Again, three or four action-oriented statements are sufficient. They should be easily understood and practiced by individual congregants within the spiritual community.