



## Values Clarification Exercise

### *Why are values and beliefs important?*

Our values and beliefs influence our attitudes and therefore our behaviours. Values and beliefs are often not spoken about and so we can make assumptions about the values and beliefs that are held by others e.g. assume that we share the same values about how we should work together as a team.

Making our values and beliefs explicit is one of the first steps in culture change because talking about them, helps us to begin to make them a reality in our workplace. A match between what we say we value and believe and what we do in practice is one of the characteristics of effective individuals, teams and organisations (Manley, 2000). For example, if we say that we believe that staff should be compassionate, we should expect to see and hear this in interactions between staff and patients.

Talking to the people we care for (patients, service users, residents, families, carers etc.) and the people that we work with (nurses, MDT, ancillary staff, managers etc.) about what they think is important (*values*) and what they feel should happen (*beliefs*) is therefore an important first step in the process of culture change – helping us to transform the way things are done.

### *What is a values clarification exercise?*

A values clarification exercise is a useful and versatile way of working together to explore your values and beliefs (Warfield and Manley, 1990). For example, you could use it to explore the values and beliefs that people hold about person-centred care, team working, pain management etc. You can then use these to create a shared purpose for practice or care. A shared purpose sets the direction; aims; and objectives or goals, helping you and your team to identify what you want to move towards.

The exercise is usually based around five questions:

- I believe the ultimate purpose of x is...
- I believe this purpose can be achieved by...
- I believe the factors that enable this purpose to be achieved include...
- I believe the factors that inhibit this purpose to be achieved include...
- Other values and beliefs that I hold about x are...

### *Who should be involved?*

Ideally, a values clarification exercise to create a shared purpose should represent the values and beliefs that are held by the people that you care for and the people that you work with.

For example:

People who you care for:	People who you work with:
<ul style="list-style-type: none"><li>• Patients, service users, residents</li><li>• Relatives, families</li><li>• Carers</li></ul>	<ul style="list-style-type: none"><li>• Nurses</li><li>• Healthcare assistants</li><li>• Therapists</li><li>• Doctors</li><li>• Members of the wider multidisciplinary team</li><li>• Managers</li><li>• Ancillary staff<ul style="list-style-type: none"><li>○ Ward clerks</li><li>○ Housekeepers</li><li>○ Caterers</li><li>○ Porters</li></ul></li><li>• Executives and board members</li><li>• Students</li><li>• Volunteers</li></ul>

The more people that can be involved in the values clarification exercise and creating the shared purpose, the stronger it will be by (acknowledging differences and):

- Helping people to see what connects them (the shared ground, the common interest) e.g. everyone agrees that mealtimes are an important part of the day, rather than the differences e.g. patients and staff, different job roles etc.
- Creating a personal connection to the change or transformation that you are trying to achieve

*How do I facilitate a values clarification exercise?*

Ideally the exercise should be facilitated with a group of people. If you are not able to get everyone together at the same time, you could run a number of small groups. Usually you would allow 30-60 minutes depending upon the number of people involved. You will need flip charts and sticky notes. Here are a number of steps that you can follow:

Collecting values and beliefs:

- First explain the purpose of the exercise to the group members so that they are clear about what you are asking them to do. For example, asking them to share their values and beliefs about x so that you can agree what you want to work towards with regards to care or practice in your workplace. Reinforce that there are no 'right' or 'wrong' answers and encourage people to contribute as much as they can and to be open and honest
- Then, ask everyone to think about the questions individually without interacting with the rest of the group, capturing their values and beliefs on sticky notes (one value/belief per sticky note). This ensures that people have the opportunity to think about their own values and beliefs without being influenced by others
- Create one flip chart for each question for collating responses
- Then ask the group members to share their values and beliefs by putting their sticky notes on to the relevant flip charts

Theming the values and beliefs:

- Invite the group members to spend a few minutes having a look at all the values and beliefs – at this point they can ask each other to clarify their contributions to ensure that they understand the meanings
- Then working with each flip chart separately, ask the group members to theme or cluster the sticky notes on that chart, identifying a name or descriptor for each theme/cluster:
  - At this stage you are looking for areas of agreement and common ground
  - Remember to work with what you have, do not introduce new ideas at this stage
  - The flip chart containing the 'Other values and beliefs...' may require a bit more exploration and discussion. Usually, these notes can be included in the other charts once the meaning has been determined

Essentially, theming is a way of organising the contributions by clustering together those with a common meaning and then identifying a title (the theme) that describes these contributions. An example of a theme created by clustering common values and beliefs could be:

#### **Communicating with patients and colleagues:**

- Having good communication skills – to talk to patients to gain their confidence, helping patients to open up
- Communicating professionally with staff and patients
- Giving feedback
- Sharing opinions
- Using appropriate language
- Using variety of skills to communicate
- Using body language

Creating a shared purpose from the themes/descriptors:

- Once all the contributions have been clustered and themed, ask the group to use the themes and descriptors to create a shared purpose statement – providing a focus and energy for any development work. You might find it helpful to use the format of the stem questions to structure this e.g. 'We believe the ultimate purpose of x is... This can be achieved by... The factors that will help us to achieve this purpose are...'
- The shared purpose should then be shown to everyone involved, perhaps displayed, inviting feedback from others before it is launched

## An example of a shared purpose statement

We believe the care that we provide should be safe, and effective, keeping patients and their families at the centre of everything that we do.

This can be achieved by working together as an integrated multi-disciplinary team.

The factors that will enable us to achieve this are:

- A clear understanding of our roles and the roles of others
- A commitment to listening to patients and their families
- Opportunities to learn and develop knowledge, skills and competencies
- Effective communication between all team members
- Feeling valued and supported by the team and our managers

### *What if I can't work with a group?*

It is still possible to undertake a values clarification exercise, even if you are not able to get a group of people together. Here are some suggestions:

- You could create a questionnaire using the stem questions and send to people by email, or hand-deliver asking them to complete and return to you. You will need to include a clear explanation of the purpose of the questionnaire and how their contributions will be used
- Once you have received all the replies, you can collate all the values and beliefs using separate sheets for each question and then follow the process as described above for theming, creating descriptors and creating a shared purpose statement
- It may be possible to do some of these stages with one or two other people, or to ask people to give you feedback at each stage
- Once you have completed the process, ideally you should share this with all who have contributed – showing the steps that you have taken You could do this by creating a single document or by creating a display for a notice board
- It is important to ask people for feedback e.g. Are you happy with how your contributions (i.e. what you have said) have been used/represented?

### *What happens next?*

Working together to explore values and beliefs to develop a shared purpose is a really useful way of engaging with staff, helping them to identify what unites them, leading to energy, enthusiasm and ownership. Staff will often gain as much from contributing and listening to others as they do from creating the shared purpose. However, this is only the first step. The next step is to work together to critique/evaluate practice, to 'look at what is happening' at an individual/team level to identify the gaps between what we say we will do in our shared purpose statement (the values and beliefs that are spoken about) and what we actually do (the values and beliefs that are experienced).

### *Hints and tips:*

- *Try to embrace as many voices as possible, rather than just the voices of a few – a collaborative process*
- *Some groups/people need more encouragement than others – so be patient and open-minded*

- *Create opportunities to share the contributions of everyone – there is much to be learnt from listening to the perspectives of others*
- *Take your time – it is more helpful to move more slowly and gain the involvement of many rather than rush forward with the ideas of a few*

### References

- Manley, K. (2000) Organisational culture and consultant nurse outcomes: Part 1: organisational culture, *Nursing Standard*. Vol. 14. No. 36. pp 34-38.
- Warfield, C. and Manley, K. (1990) Developing a new philosophy in the NDU. *Nursing Standard*. Vol. 4. No. 41. pp 27-30.

### Wider resources

Picture cards can be purchased from: <http://www.evokecards.com/>

Dewing, J., McCormack, B. and Titchen, A. (2014) *Practice Development Workbook for Nursing, Health and Social Care Teams*. Chichester: Wiley Blackwell. Chp 2:

- Knowing and demonstrating values and beliefs about person centred care. pp 17-38.
- Developing a shared vision for person-centred care. pp 39-59.

Dewing, J., McCormack, B. and Titchen, A. (2014) Companion website material for *Practice Development Workbook for Nursing, Health and Social Care Teams*. Chapter 2: Knowing and demonstrating values and beliefs about person-centred care. Chichester: John Wiley & Sons, Ltd. [http://higheredbcs.wiley.com/legacy/college/dewing/111867670X/supp/Chapter\\_2\\_web.pdf](http://higheredbcs.wiley.com/legacy/college/dewing/111867670X/supp/Chapter_2_web.pdf)