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Analysis & Needs Assessment

ORGANIZATION ANALYSIS

About the Organization:

The organization for which a training will be developed is the [REDACTED]. With more than a million visitors a year, the [REDACTED] is the most visited tourist destination in the state of New Mexico. The [REDACTED] has recently come under an entirely new management team. The specific area for which training will be developed is the [REDACTED]. This team is responsible for the upkeep and maintenance of all [REDACTED] properties and facilities including the [REDACTED]. Additionally, this team assists with safety management and the oversight of new construction projects across all properties.

Business Strategy:

The business strategy which is best aligned with the goals and operations of the [REDACTED] is a *concentration strategy*. According to Noe (xxxx), "A concentration strategy focuses on increasing market share, reducing costs, or creating and maintaining a market niche for all products and services" (p. 89). With this, a government funded organization such as the [REDACTED] focuses specifically on reducing costs and creating and maintaining a niche for the services provided. This is reflected in the [REDACTED] Vision Statement, which outlines that the [REDACTED] is committed to "Leading innovative collaboration in connecting people, plants and animals." The proposed training program, *Identifying What Matters – A Values Congruence Training* will support this business strategy as it will be an innovative collaboration between members of the [REDACTED]. This training opportunity will create and contribute to a culture of trust and respect between management and employees. This outcome is imperative in serving the business strategy as it pertains to maintaining a niche for the highly specialized services provided by the [REDACTED].

AUDIENCE/PERSON ANALYSIS

Training Audience:

- 16 regular, full-time employees (3 Managers)
- Majority male (87%)
- Age 30-60 (majority 35-45, 1/3 preparing to retire within 5 years)
- Average education obtained: High School
- Race/Ethnicity is reflective of local population

Needs Assessment Techniques:

Survey (Employee, n=8), Interview (Management, n=2)

Person Characteristics:

- *Personal Values* - Characteristics and behaviors that motivate and guide personal decisions. Workplace behavior and performance can be negatively affected if employee personal values are conflicting or misaligned with organizational values.
- *Age* – Age is often attributed to level of experience, particularly with management and ability to lead. Age can also impact employee willingness to participate in innovative or collaborative efforts which do not directly impact the ability to do the job.
- *Work History/Status* – In a hierarchical organization, longevity is perceived as a symbol of status. Those who are new to executive or advanced roles may receive pushback from long-term employees who remain in entry or intermediate level positions.
- *Awareness of Training Needs* – The awareness of a training need may indicate willingness to participate in future training opportunities.
- *Preferred Learning Methods* – Identifying preferred learning methods amongst employees allows for the development of effective training platforms, activities, etc.

Person Analysis Findings:

Surveys and interviews indicate that there is currently a culture of mistrust, broken communication, and frustration at the [REDACTED]. There is a disconnect between personal values and perceived adoption of [REDACTED] values. A majority of [REDACTED] are older, have worked for the [REDACTED] for several years, and are in intermediate/advanced trade positions (ex: Plumber, HVAC technician, etc.) The introduction of new management personnel (no prior history with [REDACTED]) in conjunction with previous management personnel *and* strategy (“ruling with an iron fist”, “whip-crackers”) has resulted in a current culture of mistrust, broken communication, and frustration. Employees have identified several areas of training need, with the most prominent being *Quality Training*. Furthermore, employees have identified preferred learning methods as being attending/watching a lecture and participating in small group discussion. For detailed information collected in the Needs Identification Survey & Management Interviews, see Appendices A & B.

Training Implications/Potential Solutions:

With new management can come new direction – and now is the perfect opportunity for leadership of this team to address some of the hurdles that are negatively impacting team performance. This must start with aligning employee values with the values of the organization and can result in the cultivation of a culture of trust and open communication. The identified solution to these problems (among many others) is for the team to work together in outlining team values, which are informed by personal values and can then be aligned with organizational values. From here, leadership will be able to make progress in other new and innovative management strategies, including team goal-setting, re-directing negative behaviors, guiding and rewarding performance, etc.

TASK ANALYSIS

Job Task:

Management must have a productive conversation in which there is a shared understanding of where they currently are vs. where they want to be (short & long-term goals). This will be imperative in explaining the value of the training activity to employees and ensuring the team is progressing as a unit. See Appendix C: *Priming Activity for Leadership* for details.

Primary Training Pressure Points:

1. Management Level – Ensuring that former management/leaders feel heard and included in the innovative and collaborative efforts to improve organizational culture will be of key importance.
2. Employee Level – Capturing a breadth of employee input and ensuring the generation of team values, which are reflective of the group - in addition to making sure they align with overall organizational values, is imperative in the success of this training activity.

Training participants will be expected to identify personal values, develop team values through a shared learning activity, and discuss connections between these two sets of values and the organizational values as outlined by the [REDACTED].

TRAINING OVERVIEW

See Appendices C & D.

**Identifying What Matters – A Values Congruence Training
Learning Activity Guide**

Learning Activity: PART III - Creating & Mapping Personal, Team, & Organizational Values (to be completed after Parts I and II - see Appendix D).

Desired Outcome: At the conclusion of this activity, the [REDACTED] Team will have developed a set of team values.

Duration: 45-60 Minutes

Required Materials: Computer, Projector, Sticky Notes, Markers, Whiteboard, Dry-Erase Markers & Eraser

Room Set-Up: Individual/small group seating, fan-shape with participants facing whiteboard.

Learning Activity Overview & Proposed Timeline:

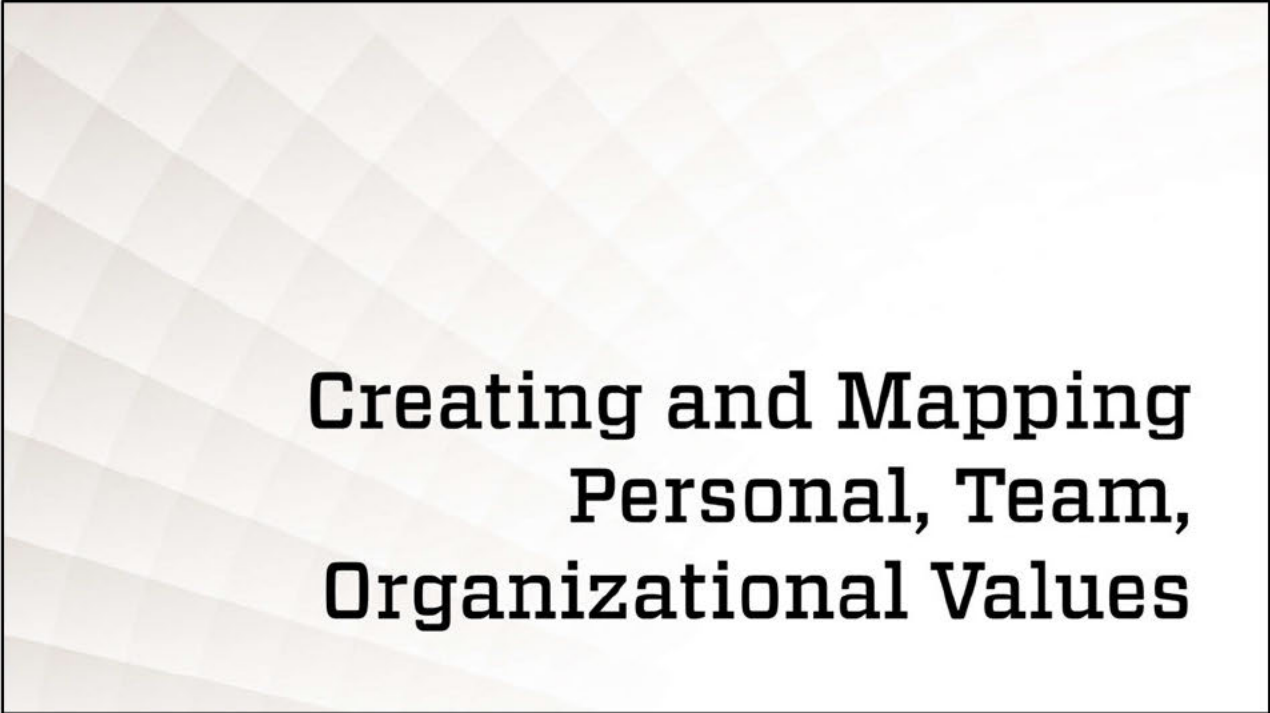
STEP 1: Facilitator will prepare a brief presentation to help employees understand the importance and impact of creating team values. This will be followed by outlining a roadmap for training participants to understand the connection between *Personal Values > Team Values > Organizational Values*. Facilitator will then provide a brief review of [REDACTED] Organizational Values (15-20 minutes).

STEP 2: Facilitator will hand out two sticky notes and a marker to each participant. Participants will write one personal value that informs their daily behavior/work on each sticky note. Participants will then place their sticky notes on a plain whiteboard. Sticky notes can be placed randomly and in no particular order or fashion (5-10 minutes).

STEP 3: Once all participants have included their personal values, the facilitator will work with the group to identify common themes amongst the personal values on the whiteboard. Sticky notes can then be grouped and categorized on the whiteboard. This is the creation of team values and their definitions (10-15 minutes).

STEP 4: The facilitator will wrap up the learning activity through mapping *Individual Personal Values > [REDACTED] Team Values > Broad [REDACTED] Organizational Values*. Facilitator will generate a single page document of Team Values to be shared with all team members (5-15 minutes).

Learning Activity Guide & Presentation: (Attached)



**Creating and Mapping
Personal, Team,
Organizational Values**



Introductory Icebreaker Video: A short clip to get the team thinking about teamwork, shared goals, values systems, etc.



Training Objective: To develop a set of team values, and to understand the connection between personal, team, and organizational values.



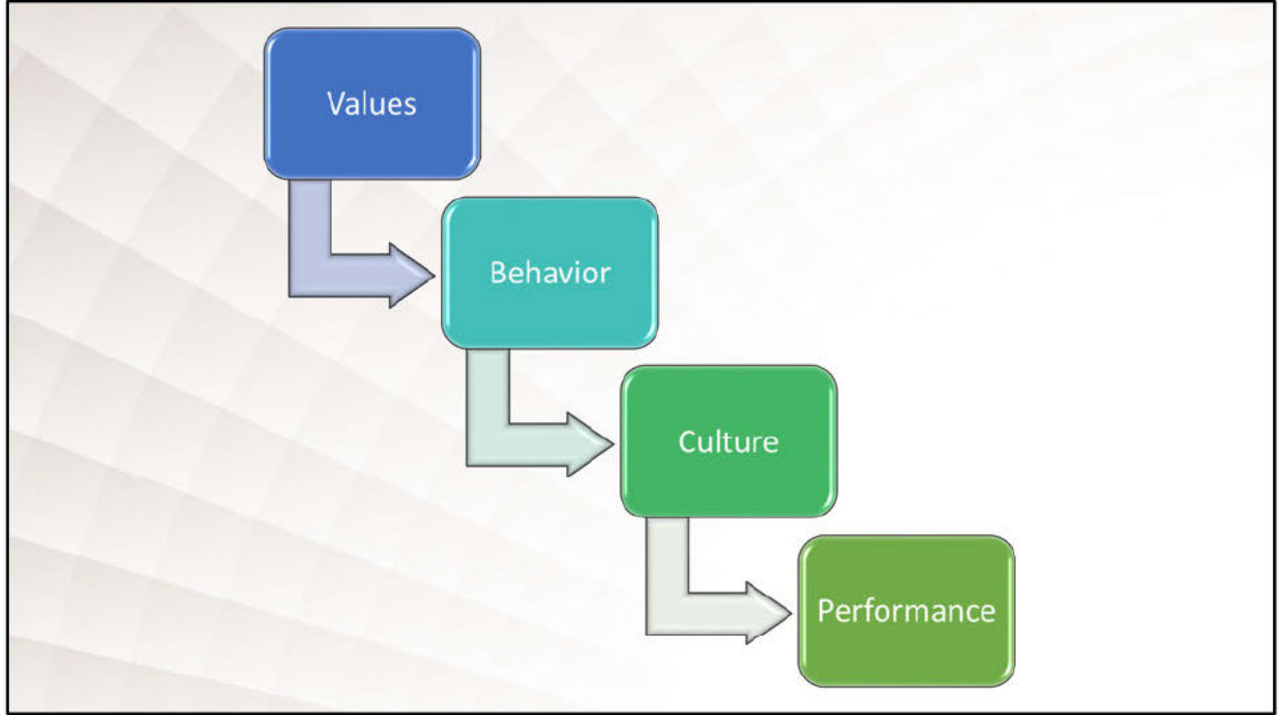
Values... So, what?

...What are values?

...Why do they matter?



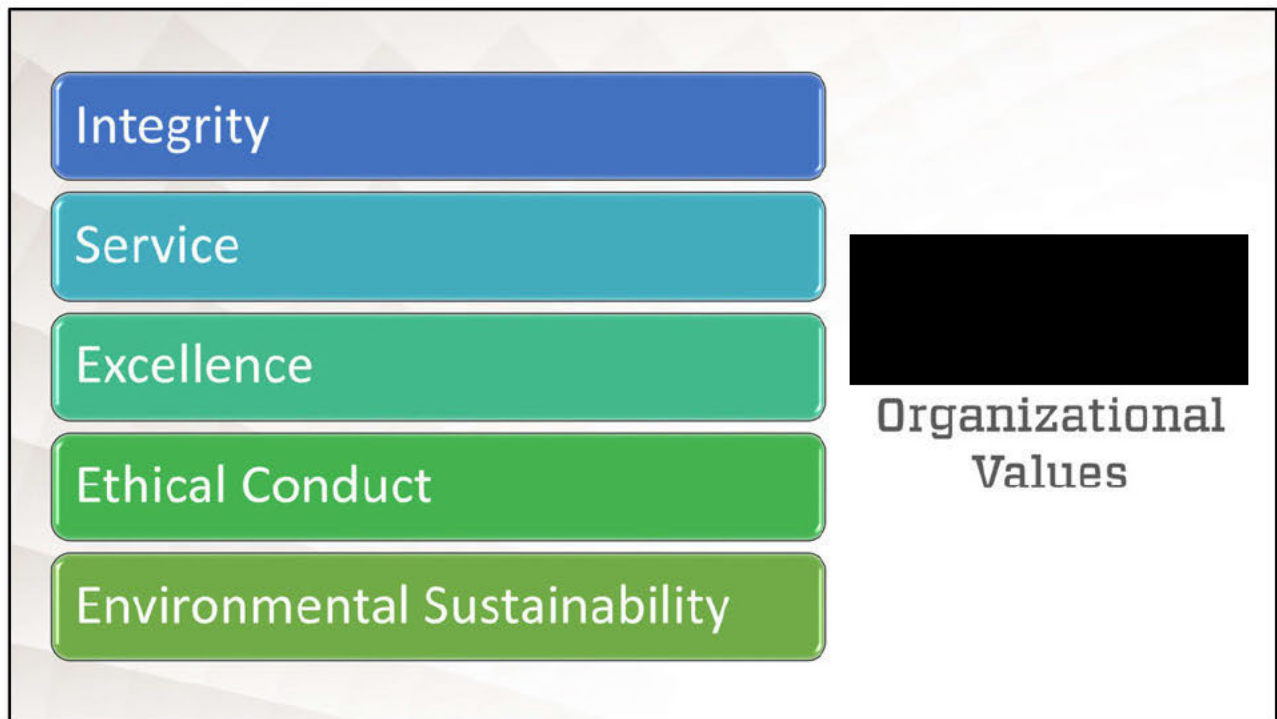
About Values: Have participants think back to the icebreaker activity (telling a story about a personal value). Ask team members to define values and discuss why they matter through asking the questions written on this slide. As team members begin to participate, guide discussion from focusing on personal values to team values and how values play a role in the workplace. Once discussion has slowed, re-cap main points.



Values Set the Tone for the Team: Values influence behavior, behavior influences culture, and culture influences performance. High-performance teams start with strong values.



Organizational Values



Organizational Values Overview:

INTEGRITY

- Employees are open-minded, flexible in their thinking, and transparent in their actions
- Employees are honest about their work, taking responsibility for success, failure, and correction
- Employees are courageous, willing to give and ask for help, then make the tough decisions that represent the right thing to do

SERVICE

- Employees deliver on their commitments and follow through on their obligations as public servants
- Employees demonstrate knowledge of their product and operations and demonstrate proficiency in their jobs every day
- Employees are aware of changing customer needs and continually improve the quality of service and its delivery

EXCELLENCE

- Employees each lead by example and inspire each other to thrive, excel, and achieve their personal and professional potential
- Employees do ordinary things extraordinarily well and welcome and embrace learning, change, and challenge
- Employees are role models of respect, expertise, and professionalism that inspire trust in themselves and government
- Employees commit to work together as a team in order to promote communication, diversity and critical thinking with high-quality outcomes

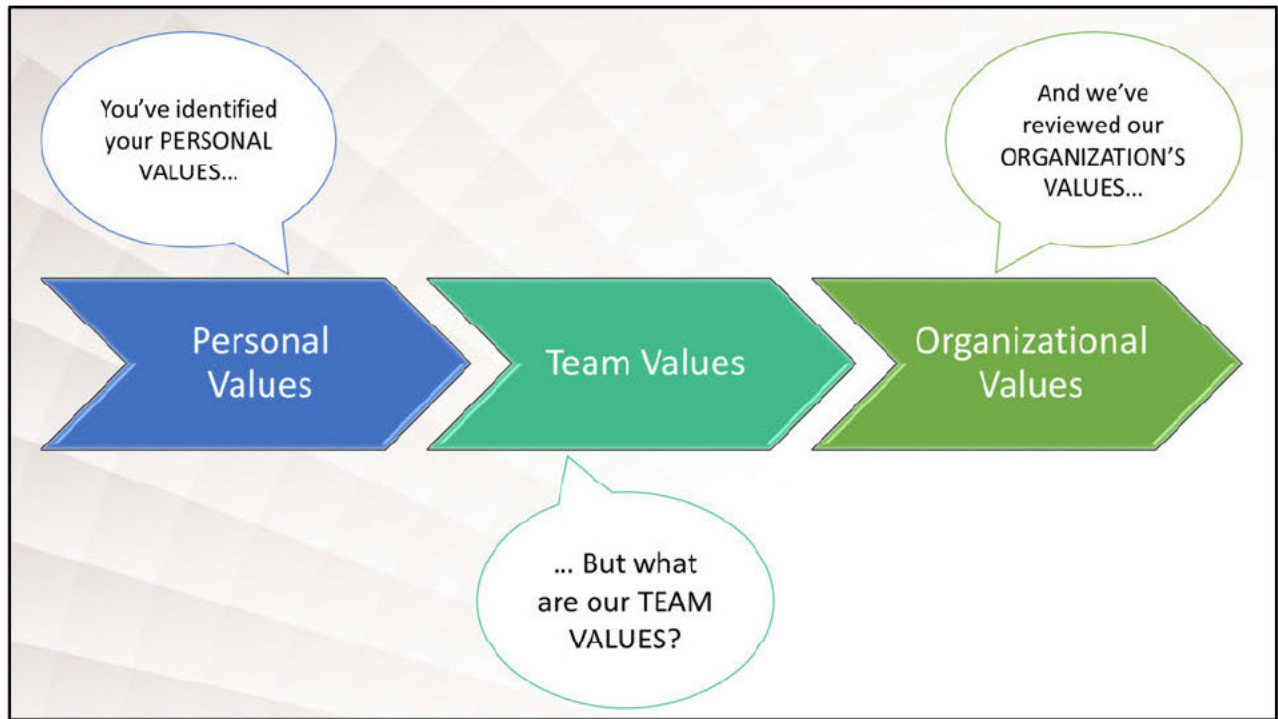
ETHICAL CONDUCT

- Employees use time and City resources productively for work-related purposes
- Employees act and make choices with honesty and integrity in compliance with [REDACTED] rules and regulations
- Demonstrates a positive portrayal of City values, as a representative of the City on and off duty

ENVIRONMENTAL SUSTAINABILITY

- Departments and employees commit to practicing environmental sustainability through Reducing waste, Reuse of resources, and Recycling whenever possible
- Departments will promote and encourage environmental awareness and consider sustainability issues when making decisions
- Departments will make resources available to implement environmental risk management procedures

Open Question to Participants: Which of these organizational values is most in alignment with your personal values? The least?



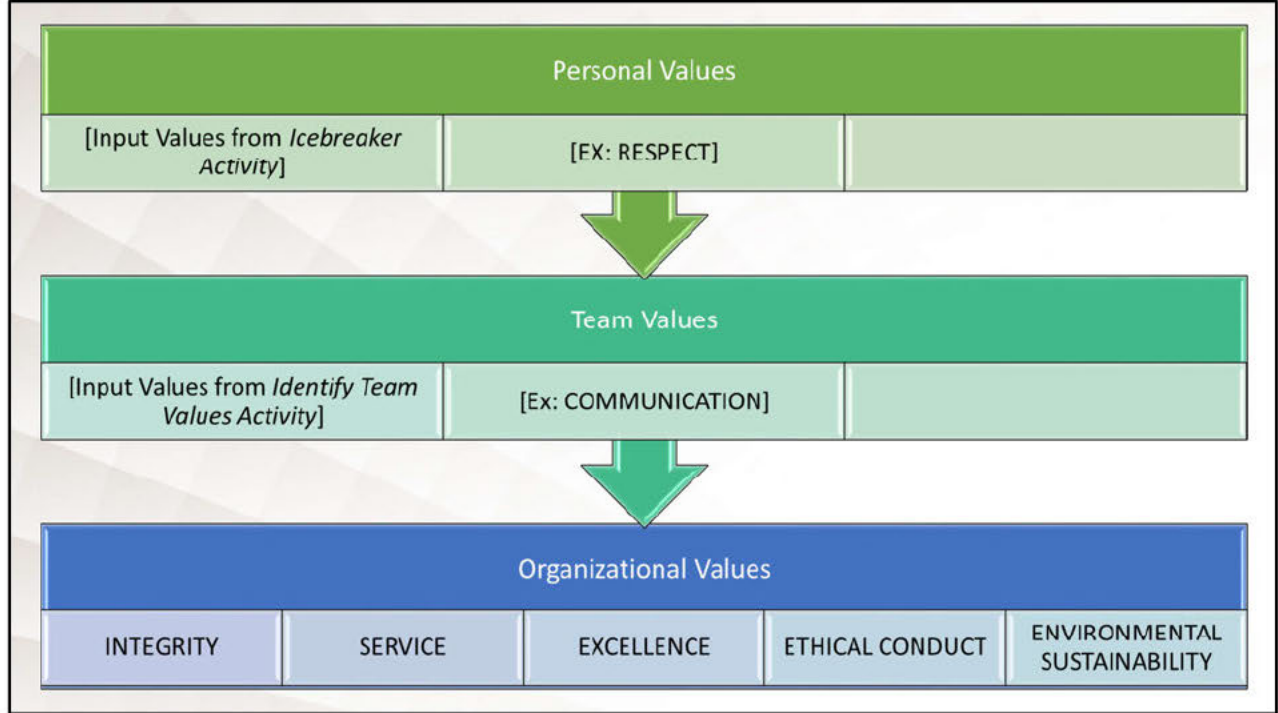
The Connection Between Personal, Team, and Organizational Values: Organizations aim to hire employees with shared values. Similarly, people seek work in organizations which reflect their own personal values. The [REDACTED] is a *large* organization with broad values. In daily work, however, this team's values may look very different from that of Waste Management or the Police Department. Identifying team-specific values will not only help this team better live by the [REDACTED] [REDACTED] organizational values, but will result in higher team performance.



Activity – Identify Team Values: If there is a screen separate from the whiteboard, leave this slide up. If the whiteboard is the screen, close the presentation. Facilitator will hand out two sticky notes and a marker to each participant. Participants will now begin the congruence activity as they will write one personal value that informs their daily behavior at work on each sticky note. Participants will then place their sticky notes on the whiteboard. Sticky notes can be placed randomly and in no particular order or fashion. Once all participants have included their personal values, the facilitator will work with the group to identify common themes amongst all values on the whiteboard. Through this activity, the facilitator should discuss the idea that the whole is greater than the sum of its parts. The value groups will be characteristic then not of each individual, but of the group. Sticky notes can then be grouped and categorized on the whiteboard (MAX = 5 Values/Categories). This is the identification and creation of team values.



Creating Team Values: As the *Identifying Team Values Activity* comes to a close, input agreed upon TEAM VALUES on this slide. Ask participants to reflect on this and discuss how this list of values will impact their work behavior, culture, and performance. Use this slide to share Team Values with the team.



Mapping Personal, Team, and Organizational Values: Input values from *Icebreaker Activity* in the “Personal Values” section. Input values from the *Identify Team Values Activity* in the “Team Values” section. Ask participants to look for connections between specific personal values, team values, and organizational values. Discuss until participants slow in their comments. Review why values are important and how they impact the work environment (*Setting the Tone for the Team*).



Evaluation Design

Level 1: Reaction

A 5-item survey will evaluate learners' reaction to the training program.

Sample Survey:

Rate the extent to which you agree or disagree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
My knowledge of workplace values has increased since attending training.					
The training design and activities were valuable in my learning.					
The training was relevant to my daily work.					
Overall, I am satisfied with the training.					
I would recommend this training to others in my organization.					

Level 2: Learning

The most efficient way to gain an understanding of learning would be through conducting a short assessment.

Sample Quiz/Open-Ended Survey Items:

1. What are values? (Short Answer)
2. What role do values play in the workplace? (Short Answer)
3. Drag and drop the following into the correct sequential order: (Drag & Drop)
 - a. Values > Behavior > Culture > Performance
4. Complete the following statement: _____ teams start with strong values. (Multiple Choice)
 - a. Low-Output
 - b. High-Performing
 - c. Dysfunctional
 - d. Executive
5. Consider the Team Values developed in this training event. Discuss the connection between a personal value, this team value, and a _____ organizational value. (Long Answer)

Personal Values:

- Integrity
- Service
- Excellence
- Ethical Conduct
- Environmental Sustainability

Organizational Values:

- [Redacted]

Level 3: Behavior

To gauge a change in behavior, a sample of questions from the *Needs Identification Survey** would be re-administered to employees 60 days post-training. This data will be compared with the results of the initial Needs Identification Survey to measure a change in perceived behavior. Additional survey items may be generated as pre-/post- questions to understand a change in employee behavior based on newly developed Team Values.

Sample Survey (Re-Administered Questions ONLY):

Rate the extent to which you agree or disagree with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
My colleagues are open-minded and flexible.*					
My colleagues are honest about their work, taking responsibility for both successes and failures.*					
My colleagues deliver on their commitments and demonstrate proficiency in their jobs every day.*					
My colleagues are aware of changing needs and work to improve the quality of service provided to the public.*					
My colleagues lead by example and are role models of respect, expertise and professionalism.*					
My colleagues are committed to working as a team to promote communication and diversified thinking.*					
My colleagues use time and city resources productively for work-related purposes.*					
My department and/or colleagues commit to practicing environmental sustainability through the proper use of resources, and recycling whenever possible.*					
My department promotes and encourages environmental awareness and considers such issues when making decisions.*					

Level 4: Results

Direct Costs	
Instructor	\$0
In-House Instructor (1 Day @ \$25/Hour)	\$50
Fringe Benefits (25% Salary)	\$12.50
Travel	\$0
Materials (\$1 x 20 Participants)	\$20
Space & Equipment	\$0
Refreshments (\$5 x 20 Participants)	\$100
Total Direct Costs	\$182.50
Indirect Costs	
Training Management	\$0
Clerical & Administrative	\$0
Fringe Benefits (25% Salary)	\$0
Postage/Shipping/Telephone	\$0
Pre-/Post- Training Materials	\$0
Total Indirect Costs	\$0
Development Costs	
Fee for Program Purchase	\$0
Instructor Training	\$0
Total Development Costs	\$0
Overhead Costs	
General Organization Support (10% Total Costs)	\$18.25
Compensation for Trainees	
Salaries & Benefits (Time Away from Job)	\$660.00
Total Training Costs	\$860.75
Cost Per Trainee	\$43.04

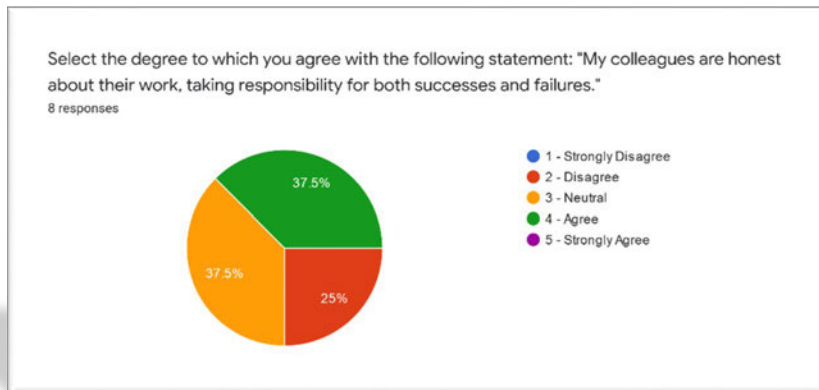
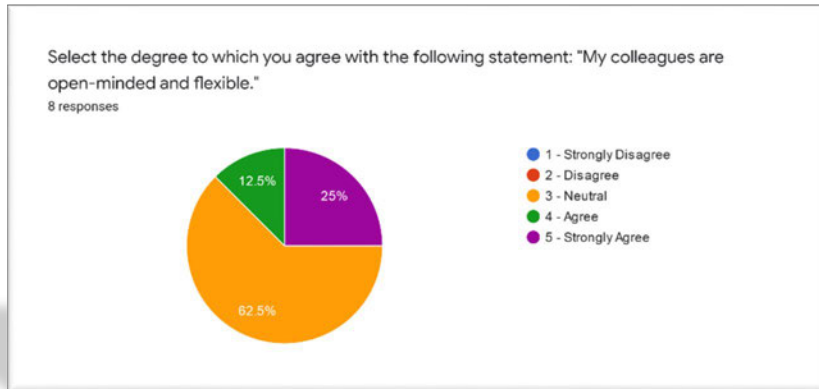
Cost analysis based on participation of twenty employees in a two-hour, on-site, internal training activity – including management team and subordinates (all [REDACTED] Team members). Suggested measures for annual cost/savings benefit may include, but are not limited to, employee turnover, reported absence in hours/salary, project duration/timelines, and more.

APPENDIX A: Needs Identification Survey Results

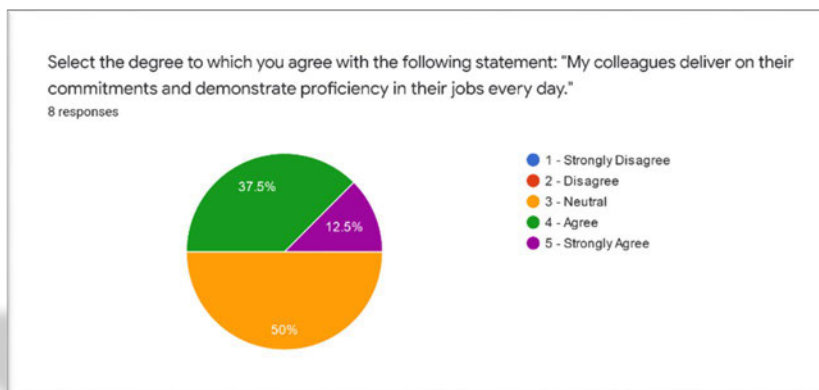
Survey Open 04/09/21-04/12/21
n=8 (50% Response Rate)

The [redacted] Needs Identification Survey was designed to gauge employee perception of the degree to which their teams/colleagues practiced organizational values as outlined by the [redacted]. Additionally, participants were asked to identify personal values, work history & status, potential future training opportunities, and preferred learning methods.

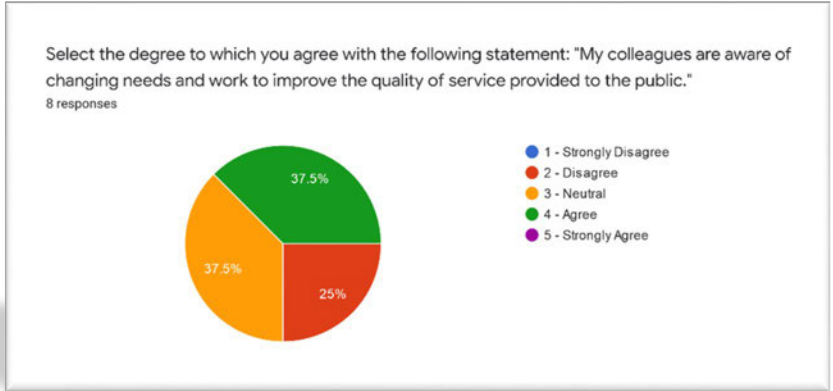
The following questions speak to [redacted] Value: INTEGRITY



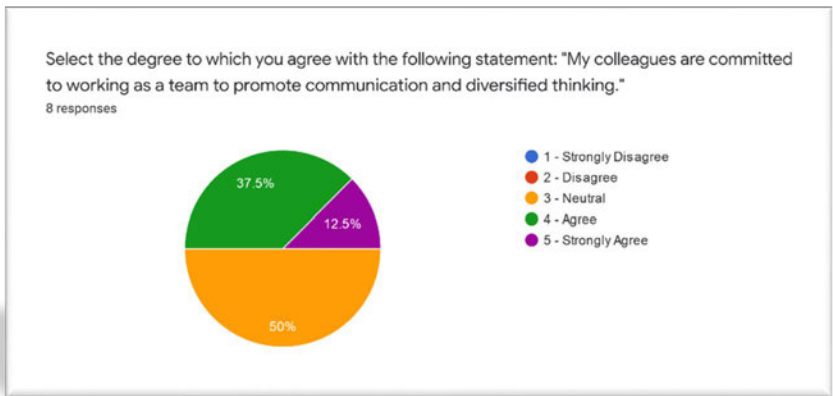
The following questions speak to [redacted] Value: SERVICE



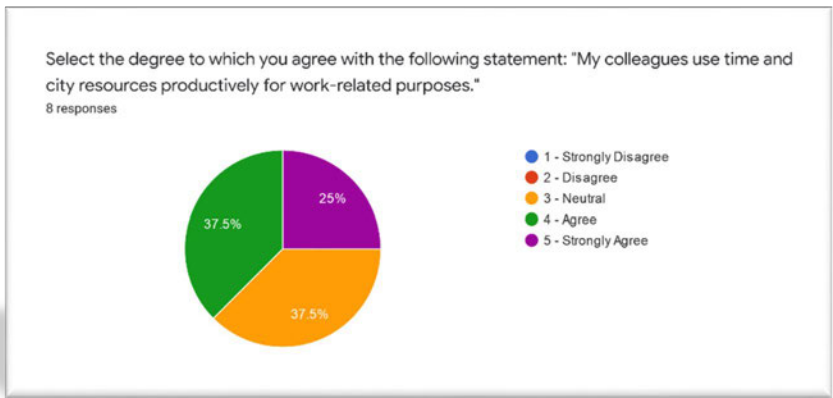
Identifying What Matters: A Values Congruence Training



The following questions speak to Value: EXCELLENCE



The following questions speak to Value: ETHICAL CONDUCT



Identifying What Matters: A Values Congruence Training

The following questions speak to Value: ENVIRONMENTAL SUSTAINABILITY

Select the degree to which you agree with the following statement: "My department and/or colleagues commit to practicing environmental sustainability of resources, and recycling whenever possible."
8 responses



Select the degree to which you agree with the following statement: "My department promotes and encourages environmental awareness and considers such issues when making decisions."
8 responses



The following question asks about PERSONAL VALUES:

Personal values are the things that are important to us, the characteristics and behaviors that motivate us and guide our decisions. Review the list of common values below and write your top three in the space below.
8 responses

Optimism, Smart, Quality

Hard Work, Integrity, Respect

Fidelity, knowledge, thoughtfulness.

hard work, respect, teamwork

Thoughtful, understanding, and winning

Honesty communication improvement

Diligent

Truth, Consistency, Organization

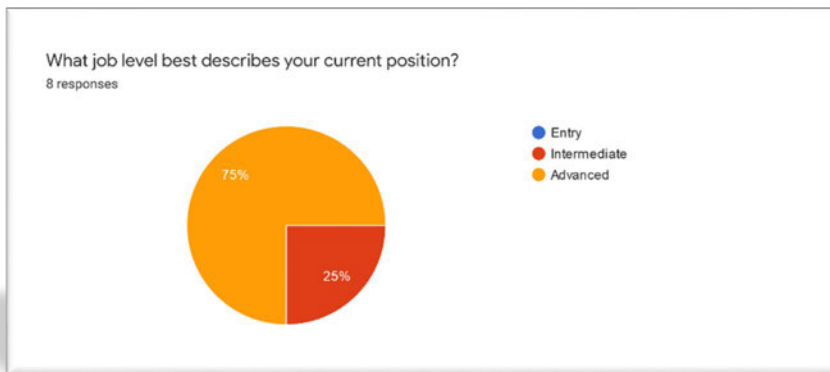
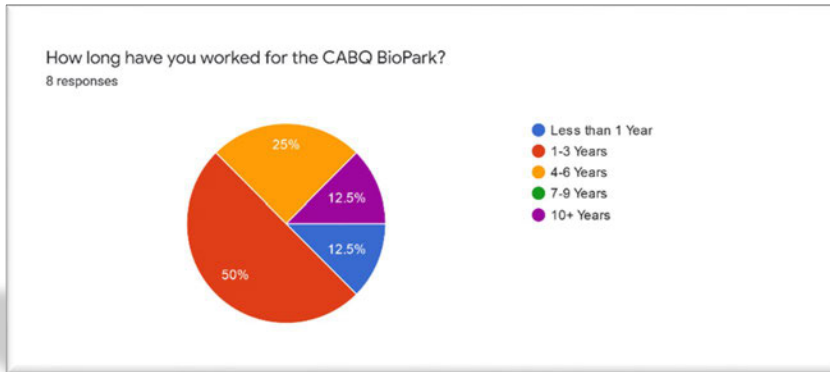
While no particular values were mentioned at a higher rate than the rest, values mentioned multiple times* include:

- Knowledge
- Respect
- Honesty
- Thoughtfulness

**This is preliminary data. At the values congruence training, management may or may not see a similar list of values generated by employees. This information should only be used to think about how leadership might approach a) designing specific values for your team, and b) aligning personal values with organizational values.*

Identifying What Matters: A Values Congruence Training

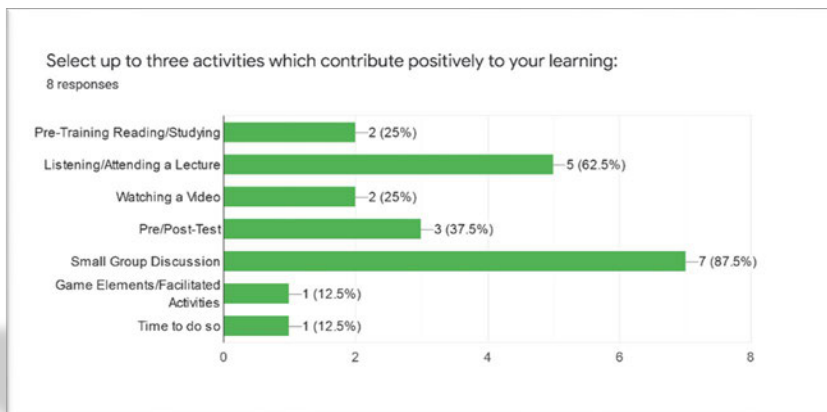
The following questions ask about **WORK HISTORY & STATUS**:



The following question asks about **POTENTIAL FUTURE TRAINING OPPORTUNITIES**:



The following question asks about **PREFERRED LEARNING METHODS**:



APPENDIX B: Management Interviews

Q&A Transcript: Manager A

Interviewee: Manager A

Title: Facilities Operations Coordinator

Level: Advanced

Duration of Employment: < 1 Year

04/10/21 11:05am-11:50am

1. Tell me about your team – who are they, demographically?

- 16 Employees (3 sub-teams)
- 5 Open Positions (current)
- 14 Male, 2 Female
- Age Range: 30-60 (1/3 expecting to retire in next 5 years)
- Average Education Level: High School
- Race/Ethnicity: Majority Hispanic
- Other Characteristics: 1/3 retired Military Veterans

2. How do you believe your team currently perceives your role?

- *The boss... The day to day operations established before my arrival – everyone knows their role, their job, what they're supposed to do. If I did nothing, they would still know what to do. There is a discord amongst them – everybody is there to do things for themselves, to get a check, and to earn their retirement. I'm trying to bring everybody together to be a team.*
- **What are their expectations of you as a leader?**
 - *Without me there, there's nobody from our area to meet with upper management and explain what we do, where we are at with anything, etc. I'm there to communicate what our tasks are to upper management. I am the gap between upper management and my team.*
- **What do you think the people you manage are looking for in a supervisor? What do they expect of you as their boss?**
 - *Direction, support, leadership...*

3. What do you believe your role is in leading this team? You mentioned, "Bringing everyone together as a team" earlier, what do you mean by that?

- *I would like to see us all be able to rely on each other and know that if anyone needed help, they could ask any of their colleagues for it. To know that we are there to support each other. To know that if somebody had missed a day of work, we'd still be there to get their tasks done. I'd like the team to know that they can depend on me for anything, if they needed help.*

4. What are your goals for this team? Is there anything in particular you want this team to excel in?

- *The team already does what they are intended to do, but there are some areas that can be improved. Communicating amongst each other, cleaning up some processes. There seems to be a disconnect between the management team and sub-teams.*
- **Do you feel that you're able to pinpoint where or what that disconnect is?**

- *Right now there's a lot of rotating of positions. People who were part of sub-teams are now part of the management team, so there is tension amongst some of the employees – specifically, management. That tension is trickling down to the rest of the team, leaving many feeling uncertain about what is to come. I think that management coming together – to set goals, etc. – will help remedy some of these issues. Sub-teams currently feel siloed – they don't feel like they are all working together as one unit.*
- 5. What skills do you believe your team currently has that contribute to group success? What skills do you think need to be developed?**
- *Some people have many, many years of experience – they've seen the park develop, they've seen management come and go, etc. We have both experience and a lack of experience on the management team. My colleagues in management are intelligent and well-spoken, but have little experience in management. My team is smart, reliable, and they have the technical skills to do their jobs and do them well. They are all qualified in their areas of expertise. The team needs to set goals together and accomplish them together. We need to work as a team instead of independently.*
- 6. Discuss your team's orientation (motivation, attitudes, goals, etc.) toward workplace-training opportunities?**
- *I think they are inclined to do it. It's hard for us to do much as a large group with COVID. I think most of the team are open and motivated to come together as a team. Others, we'd have to tell them "we're doing this" and they'll follow. Some people are satisfied with simply going to work and doing their job and going home.*
- 7. What issues have you identified in how your team functions? Explain.**
- See above answers.
- 8. Are there any other characteristics or details you'd like to discuss about your workplace, your position, or your team?**
- *Half of the management team feels that they are not part of the management team. I need to bring them in so that we are one management team working together. There are some interpersonal issues that are hard to address – like a lack of trust between some people on the team.*
- 9. Are there any regular training events/opportunities currently in place for your team?**
- *There are some trainings, but they are not team-oriented. They're more technical (sensitivity training, ethics trainings, sexual harassment training, certifications, safety trainings, etc.)*
- 10. How much time can you spend on any single training event for this team? Do you have a timeline to address particular issues?**
- *1-2 hours would be ideal. I would like to implement something sooner than later, but COVID is making it difficult for us to gather in groups right now.*
- 11. What is your budget for team training?**
- \$0

Q&A Transcript: Manager B

Interviewee: Manager B

Title: Maintenance Supervisor

Level: Intermediate

Duration of Employment: 3 Years

04/10/21 12:00pm-12:20pm

12. Tell me about your team – who are they, demographically?

- *Approximately 15 Team Members*
- *Age Range: 30-60, majority mid-range (late 30s-40s)*
- *Majority Male*
- *Average level of Education: High School, some Trade School, some College (no degrees)*
- *Average race distribution, reflective of local population*

13. How do you believe your team currently perceives your role?

- *The boss... The guy who is checking on you, making sure you're doing your work, going to yell at you and get you in trouble, lead with an iron fist - I think that's how it's perceived, not that that's how I am, but that's how it's been in the past. I'm new to the position (2.5 months).*

14. What do you believe your role is in leading this team?

- *I believe my role is a support system. I support them. They are the ones actually doing the work, so they are going to ask me for materials, scheduling, time off, communication between upper level management and other facility heads, units, the city. I am the liaison between groups within our facility. I wouldn't call myself the boss, I'd like to consider myself the leader of the team. Somebody they can come to for support - whether it's questions about who, how, where, when, etc. I'm more of an information support system, if they're having a bad day and need to re-group, I should be able to support them in that position. I'm not so much the whip cracker so to speak.*

15. What are your goals for this team? Is there anything in particular you want this team to excel in?

- *My goal would be to get our crew to a point of maintenance – a state of where we are doing preventative maintenance to keep things from breaking down – being proactive as opposed to reactive on the job.*
- *My goal for team dynamics is just to build a team. The group of guys we have now do not see our department as a team. They are individuals just treading water trying to stay afloat.*

16. What skills do you believe your team currently has that contribute to group success? What skills do you think need to be developed?

- *When you get everybody together in a group setting, and you listen to them talk – they enjoy their jobs. They like what they do and where they do it. They share an enjoyment of their work. They just feel that they're always on the defensive - trying to justify what or why they are doing something – resulting in feeling separate from the rest of the [REDACTED]. This seems to be an issue across the entire [REDACTED]. It's hard for employees to feel like they are part of the greater goal, that some groups feel less important than others, etc.*

17. Discuss your team's orientation (motivation, attitudes, goals, etc.) toward workplace-training opportunities?

- *I say we have about 80% that would be willing to learn, participate, and engage with any kind of trainings or team building opportunities. Some would push back for various reasons. The majority would be willing to give it a try.*

18. What issues have you identified in how your team functions? Explain.

- *I feel like communication is the main issue between the entire team. I think if everybody feels in-the-know and that they're important to the team, things would be better. Some people harbor information, the left hand doesn't know what the right hand is doing. Some instances folks are sitting around waiting to help without being asked to help, causing a reactive workforce. This exists throughout the maintenance team.*

19. Are there any other characteristics or details you'd like to discuss about your workplace, your position, or your team?

- *Not that I can think of.*

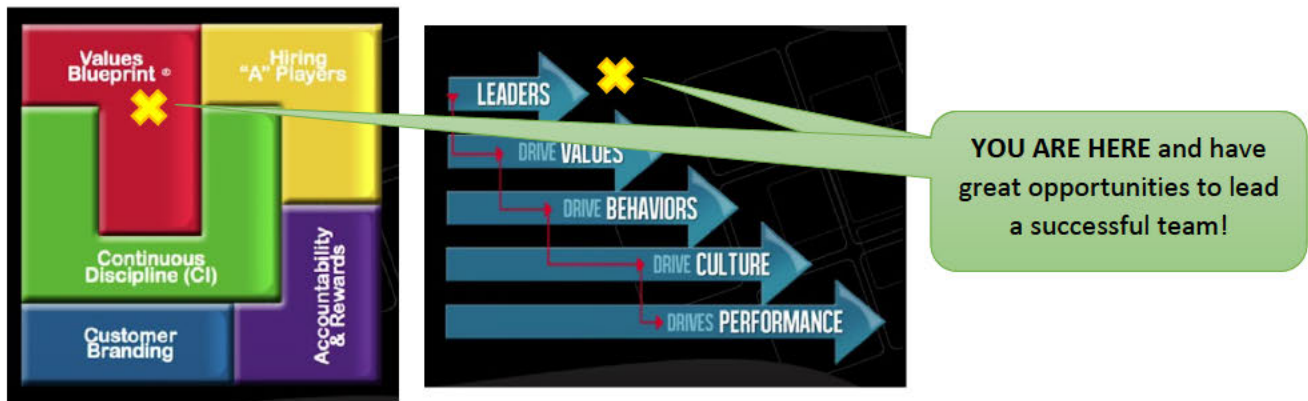
APPENDIX C: Priming Activity for Leadership

Aligning Management – Creating Organizational Culture Based on Values & Performance:

STEP 1: Watch (10 minutes): <https://www.youtube.com/watch?v=BlhM7vAltUM>

Quote: "If you get the values and the culture right, success will happen."

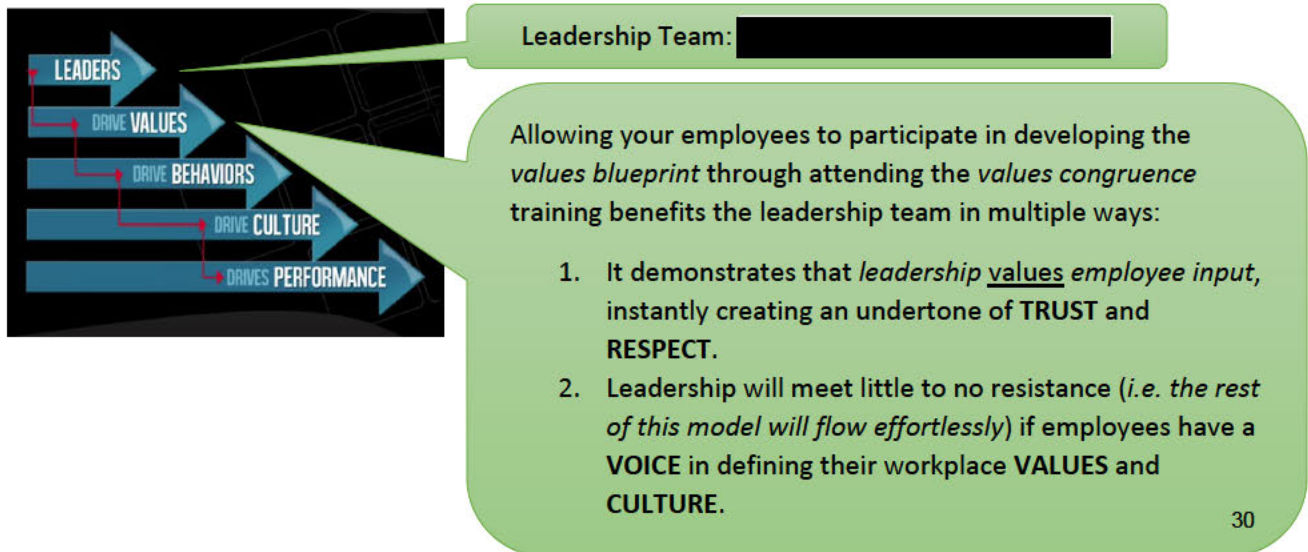
STEP 2: Gather leadership to prepare for training event.



STEP 3: Discuss the model above. Consider the following...

1. Review the data collected from the needs identification survey. What [redacted] values are most widely agreed with/practiced amongst your employees? Which are the least?
2. Per the data collected from the needs identification survey, what personal values are the most prominent amongst your employees?
3. In what ways can we, as a leadership team, implement a model like this?
 - a. What aspects of this model do you think will be easy to implement?
 - b. What aspects of this model do you foresee facing challenges in implementing? How can you be proactive in addressing those challenges?

STEP 4: Come to a uniform understanding on where the leadership team *is* and where the leadership team *wants to go* (short & long term). In utilizing the model above and considering the training activity for *values congruence*, note the following:



APPENDIX D: Identifying What Matters – A Values Congruence Training (Outline)

Desired Outcomes: At the conclusion of this training, [REDACTED]

[REDACTED] employees will be able to...

1. Discuss [REDACTED] organizational values in the context of their work.
2. Develop a set of team values.
3. Examine the connections between personal values, team values, and organizational values.

Duration: 2 Hours

Required Materials: Computer, Projection Screen, Index Cards, Sticky Notes, Pens, Markers

PART I – Why Values Matter (Priming Activity for Employees):

Watch (10 minutes): https://www.youtube.com/watch?v=_a1Fc6nwpks

Quote: *“Values are the social glue that hold us together with all our beautiful differences. If you let [people] know why a certain value is important to you – and share that through stories and not abstract definitions – you get the chance to make connections on an entirely different level.”*

Prompt for PRE-TRAINING/ICEBREAKER Activity:

STEP 1: Participants must watch video prior to attending training.

STEP 2: Facilitator (Management) will have participants bring a small object from home that represents a personal value. The icebreaker activity for training will consist of small groups (3-4 people) re-watching/ reviewing video, sharing their objects, stories, and personal values with one another (10-15 minutes).

PART II – Understanding Organizational Values:

STEP 1: Facilitator will prepare a brief presentation to review the overall organizational values of the [REDACTED] (5 minutes).

STEP 2: *Jigsaw Activity...* Participants will break into three small groups (approximately 5/each) to discuss the following in regard to two [REDACTED] organizational values (10-15 minutes):

1. How does this value inform the services provided at the [REDACTED]?
2. Where is there room for improvement in how these values are exercised on a daily basis?

STEP 3: *Jigsaw Activity, Continued...* Facilitator will ask groups to share answers to be displayed on a screen – including potential additions/follow-up comments from other groups (15 minutes). As a result, employees will gain a better understanding of organizational values, how they inform work at the [REDACTED], and how the team can collectively improve.

PART III – Creating & Mapping Personal, Team, & Organizational Values:

STEP 1: Facilitator will prepare a brief presentation to create roadmap for training participants to understand the connection between *Personal Values > Team Values > Organizational Values* (10 minutes).

STEP 2: *Values Congruence Activity...* The facilitator will hand out two sticky notes to each participant. Participants will write one personal value that informs their work on each sticky note. Participants will then place their sticky notes on a plain whiteboard (5 minutes).

STEP 3: Once all participants have included their personal values, the facilitator will work with the group to identify common themes amongst the personal values. Sticky notes can then be grouped and categorized on the whiteboard. This is the creation of team values (10-15 minutes).

STEP 4: The facilitator will wrap up the values congruence activity through mapping *Personal Values > Team Values > Organizational Values* (5-10 minutes).

PART IV – Measuring Training Success & Collecting Feedback:

STEP 1: A post-training survey may be administered three months post-training to re-measure the same survey items as outlined in the Needs Identification Survey (as they pertain to organizational values) in addition to new questions regarding team values, values congruence, and training evaluation.