

## REFERENCE SHEET: Understanding Each Other's Values

### About Cultural Values and Value Differences

We all have values that guide our perceptions, our interactions, and our choices. These values are part of our "design for living" and they are determined, in large part, by the culture or cultures we were raised in. However, we are often unaware of our own values. They are very difficult to articulate.

Have you ever tried to teach your native language to someone else? Beyond teaching words, it's very difficult to explain the underlying rules of grammar, unless you have been taught them explicitly. Values and culture are like that. They are life's grammar, the rules we live by, but we rarely notice that they even exist.

In a multicultural environment, however, we may have very different unwritten rules and values than other team members and their organizations and the individuals and families with whom we work and to whom we provide services. To effectively provide services, communicate, manage conflict, and solve problems, it is important to understand some of the different values at play in ourselves and others.

### About the Values Continuum

1. Each spectrum identifies one common concept that cultural values and norms arise from. This is NOT a comprehensive model.
2. Cultural values are not static or fixed in place. We can go back and forth on the continuum depending on the circumstances or the person with whom we are interacting. For example, some of us find ourselves shifting our value systems as we move from home to work. We may be from different cultures and shift our values from home, to the office, to the community.

## Understanding Each Other's Values

1. Refer to the Values Continuum Worksheet on following page.
2. Put an "X" on each line to show where you believe YOU PERSONALLY fall in each value continuum.
3. Put an "O" on each line to show where you believe your organization's culture falls. This may need to reflect your individual team or department's culture.
4. Share your worksheet with your colleagues. Discuss why you placed yourself at those particular places, how that reflects your particular culture.
5. Identify with your colleagues where there are values differences (both personal and organizational). Think about positive strategies for negotiating these differences.
  - How do these values impact the way we work with each other?
  - How do these values impact the way individuals view our institution(s)?
  - How might these values impact the way you provide outreach in your community?
  - How might differences in your values and those of your audience impact outreach and service delivery?

## Values Continuum Worksheet – Team



Future	Present <i>Live in the now.</i>	Past <i>History is our greatest teacher.</i>
<hr/>		
<i>Put the past behind you.</i>		
Single Focus		Multi-focus
<i>Linear/chronological</i>		<i>Past, present, future all connected</i>
Fixed		Fluid
<i>Time is of the essence.</i>		<i>Stop to smell the roses.</i>



Control by Individual <i>We create our own destiny.</i>	Control by Destiny/Fate <i>Whatever will be, will be.</i>
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Direct <i>Give it to me straight.</i>	Indirect <i>Say it nicely.</i>
Informal <i>No ceremony required.</i>	Formal <i>Show the proper respect.</i>



Equality <i>Anyone can make it to the top.</i>	Hierarchy <i>You are born into your position.</i>
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Individual <i>Follow the beat of your own drum.</i>	Collective <i>Do what's best for the group.</i>
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## REFERENCE SHEET: Personal Styles & Preferences

### About Personal Styles and Preferences

We all have “ways we like to do things”, especially in terms of how we interact with other individuals and within groups. Our preferences and styles relate to various aspects of our communication, thinking, problem-solving, and decision-making.

Have you ever been in a meeting where the group could not get to a decision together, or couldn't even have a thorough discussion with productive participation from everyone? Chances are that differences in styles were the underlying cause.

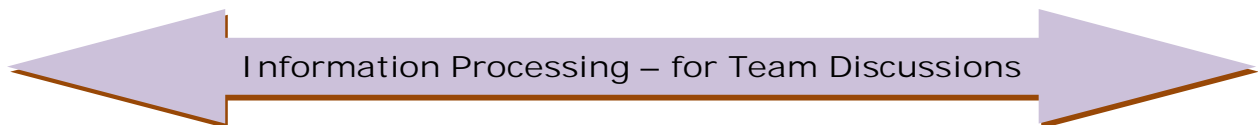
Diverse teams do not just magically work well together, especially around complex topics requiring collaborative discussion and problem-solving!

We instead need to proactively set a foundation for strong teamwork with minimal aggravation and lost time - by taking the time to explicitly understand each other's preferences and then take that understanding into account in how we:

- plan meetings (including pre-work!), to ensure we'll have productive discussions
- Plan reviews of key project deliverables, to ensure we get feedback from everyone needed
- lay out decision-making paths that allow everyone the space and time to contribute
- Plan paths toward important project milestones (deadlines) that pace everyone's progress

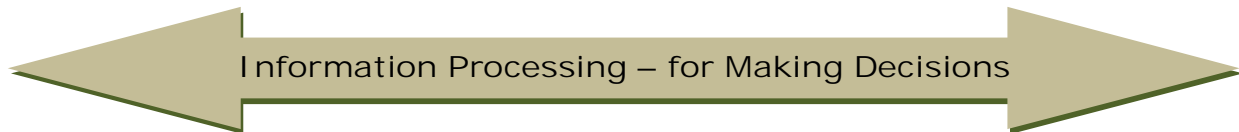
### Understanding Personal Styles & Preferences

1. Refer to the Worksheet on following page.
2. Put an “X” on each line to show where you believe YOU PERSONALLY fall.
3. If applicable – if your organization has a particular “preferred style” in any area - Put an “O” on each line to show that place on a continuum. (This might reflect your individual internal team or department's culture).
4. Share your worksheet with your colleagues and discuss why you placed yourself at those particular places, how that reflects how you prefer to work, and related collaboration situations you find to be challenging given your preferences.
5. Identify with your colleagues where there are style differences (both personal and organizational) and think about positive strategies for negotiating these differences.
  - How could these preferences inform the way we handle meetings to that they work well for everyone?
  - How could these preferences inform the way we handle group reviews of key deliverables?
  - How could these preferences inform the way we handle group decisions?
  - How might our range of preferences around sharing our work and meeting deadlines affect how we plan the path to key joint milestones?



Wants time to review and think before offering opinions

Happy to take in and give opinions on the fly



Needs time to consider options before willing to make a decision

Can suggest options and make decisions on the spot, values fast decision-making



Bottoms up, methodical, structured, detail-oriented.

Top-down, organic, spontaneous, big picture



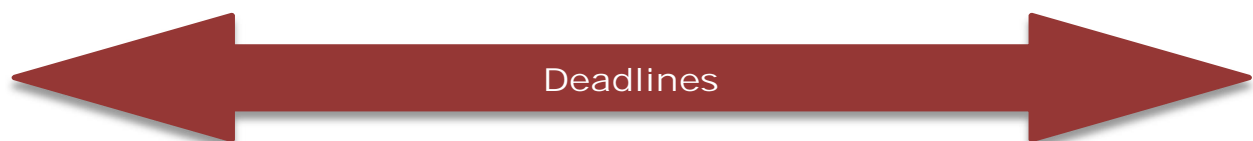
Reticent and mostly listens, may not offer opinion unless asked

Comfortable and outspoken, readily offers opinions



Wants it to be perfect before sharing for feedback; may react badly to receiving rough drafts from others.

Happy to put out rough draft work and collaborate; may get impatient when others won't do the same



Works iteratively making steady progress (& gets impatient with last-minute people)

Works best close to deadlines



Avoids conflict, may go along with others to keep the peace.

No problem with conflict, and may come across to others as brusque

TEMPLATE: Stakeholder-Influencer Assessment Worksheet

Stakeholder-Influencer Assessment					
Person and/or Group	Why stakeholder or influencer: <ul style="list-style-type: none"> <li>• Why do they <u>care</u>?</li> <li>• Are they a <u>direct audience</u>?</li> <li>• How will they be <u>impacted</u>?</li> <li>• How could they <u>support</u> it?</li> </ul>	Relative Importance <ul style="list-style-type: none"> <li>• Power (Influential vs. Insignificant)</li> <li>• Level of Interest (Active vs. Passive)</li> <li>• Attitude for or against (Backer vs. Blocker)</li> </ul>	Primary Wants and Needs How will they <u>judge value</u> of this project? What would have to be true for them to <u>consider this project a success</u> ?	Other: Cultural, Values What else do we know about them, that could help?  See Stakeholder-Influencer Values Continuum	

### TEMPLATE: Project Scope and Boundaries

IN Scope	OUT of Scope
<p>"IN": Major activities, deliverables and topics that are <i>within the scope</i> of the project and are the responsibility of the project core team.</p> <ul style="list-style-type: none"> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> </ul>	<p>"OUT": Major activities, deliverables and topics that <i>may be related</i> to the project, but that are <i>outside</i> of the scope of the team's work on this project.</p> <ul style="list-style-type: none"> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> </ul>
<p style="text-align: center;">Project Completion:</p> <p>This project will be considered complete when _____</p> <p>_____</p> <p style="text-align: center;"><i>(state the final activity or deliverable)</i></p>	



Risk Assessment and Planning Table

What's the Risk? (Use Cause-Effect-Impact statement)	What would it impact? (Schedule, Budget, Quality, Audience, other)	How likely to occur? (Probability)	How severe an Impact?	Risk Score P x I	How could we <u>avoid</u> or <u>lessen</u> this risk?	Owner



## TEMPLATE: Team Operating Agreements and Communication Plan

In the space below, write guidelines for the items that are important for your team.

- INTERACTIONS - team norms
- MEETING schedules and effectiveness
- ELECTRONIC communication
- DOCUMENT storage and sharing
- COORDINATION - calendars, dependencies, progress
- PUBLISHING results and products
- ISSUES & CONFLICT – Raising, resolving
- DECISIONS – Making, communicating
- CHANGES - Controlling, communicating

TEMPLATE FORMAT: Stakeholder – Influencer Engagement and Communication Plan

First, we identified them and worked to Understand them:

Stakeholder/Influencer Assessment			
Person and/or Group	Why stakeholder or influencer: <ul style="list-style-type: none"> <li>• Why do they care?</li> <li>• Are they a <u>direct audience</u>?</li> <li>• How will they be <u>impacted</u>?</li> <li>• How could they <u>support</u> it?</li> </ul>	Relative Importance <ul style="list-style-type: none"> <li>• Power (Influential vs. Insignificant)</li> <li>• Level of Interest (Active vs. Passive)</li> <li>• Attitude for or against (Backer vs. Blocker)</li> </ul>	Primary Wants and Needs How will they <u>judge value</u> of project? What must be true for them to consider <u>this project a success</u> ?
			Other: Culture, Values What else do we know about them, that could help?

Stakeholder/Influencer Engagement and Communication Plan  
 Now we must expand to include how and when we will involve them and communicate with them

... Stakeholder/Influencer Engagement and Communication Plan				
Stakeholders and Influencers (Including Audiences)	How to <u>involve</u> ?	What keep <u>informed</u> on?	How to best communicate	When?
Person, Group	How should we <u>involve</u> them in the project, and <u>starting when</u> ? E.g. do they need to participate in particular design work or reviews?	What do we need to <u>communicate</u> , keep them <u>informed</u> about?	Best <u>way to communicate</u> with them --- based on what we know about them and organization.	How <u>often</u> or at what <u>specific points</u> should we communicate?

## Project on a Page for Ongoing Team Alignment

A key deliverable of CoPM is the “Project on a Page” (PoP).

The Playbook steps form a Team Alignment process which then culminates in a one-page summary of the project across the Playbook areas.

The PoP is a key communication tool that reflects aspects of alignment achieved and should be used a regular “quick reference” for ongoing alignment as an easy-to-use reminder during project.

POP (Project on a Page)		Team Project:
<p><b>The Partnership Team</b> Organizations, team members, their roles, and their definition of a successful project. (See also our Partnership Map)</p> <ul style="list-style-type: none"> <li>▪ (Principal Investigator): Name, Org, definition of project success</li> <li>▪ (Principal Investigator): Name, Org, definition of project success</li> <li>▪ Etc.</li> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul> <p><b>Stakeholders &amp; Influencers (incl. Audiences)</b> Organizations and individuals who care about this project</p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul> <p><b>Scope - Clarification of Project Boundaries</b></p> <p><b>Ins:</b></p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> <li>6.</li> </ol> <p><b>Outs:</b></p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> </ol> <p>This project will be considered complete when</p> <hr/> <hr/>	<p><b>Critical Success Drivers (CSDs)</b></p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul> <p><b>From Project Plan/Timeline: Key Milestones &amp; Dependencies</b></p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul> <p><b>Top Risks</b></p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul> <p><b>Status as of [date]</b></p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul> <p><b>Major Open Issues as of [date]</b></p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> </ul>	<p><b>Team Communication &amp; Operating Agreements</b></p> <p><b>Team Meeting Approach &amp; Norms</b> (Meeting frequency, Processes and norms: e.g. Have an agenda and use it, one person talks at a time, arrive on time)</p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol> <p><b>Other Team Operating Agreements</b> (Processes such as how we will raise issues, make and communicate decisions, request and manage changes, how often we will meet. Norms such as “show respect for all opinions, value each other’s time, respect each organization’s culture and constraints when we plan.”)</p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol> <p><b>Stakeholder-Influencer Engagement and Communication Plan – critical items</b></p> <ul style="list-style-type: none"> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> <li>▪</li> </ul>