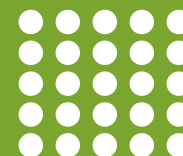


TIME Transforming Institutional
Models for Equity

LIVING OUR VALUES WORKBOOK

A practical tool for organizations and teams to apply the
three-step approach found in the Living Our Values Guide.



HOW TO USE THIS WORKBOOK

Purpose of this Workbook

This workbook helps organizations and teams translate their values into daily practice. It is designed to support culture-building, leadership development, and values-aligned decision-making in times of transition.

This workbook is designed to be used alongside the **Living Our Values Guide**.

It assumes familiarity with the three-step approach found in the Guide and focuses on application, reflection, and practice. If you are new to the approach, we recommend reviewing the [Guide](#) first. This workbook is where the work happens.

Who this Workbook is for

This workbook is designed for:

- Organizational leaders
- People & Culture teams
- Managers and staff teams
- Networks and coalitions
- Individuals navigating leadership in complexity



How to Use it

- Work through the steps sequentially as part of a values refresh or strategy process.
- Select individual worksheets for team discussions, retreats, or performance conversations.
- Use the tools regularly as part of ongoing learning, accountability, and culture-building.
- Refer to the organizational example at the end of the workbook to see how it can all come together.

Remember: some organizations move through this in weeks; others return to it over months. There is no single right pace.

Before You Begin

Most organizations ***have values on paper***, but that doesn't mean they are:

- Relevant right now
- Known by staff
- Used in decisions, or
- Actively lived.

Values must be revisited, examined, debated, stress-tested, and practiced together.

This is why with the TIME Transformation Lab ***the process is the intervention***.

How you reflect, revise, and live your values is itself part of the transformation.

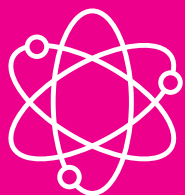
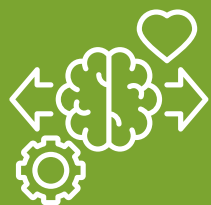
STEP 1

Confirm Your Core Values

Values must be relevant, known, and actively lived. Many organizations technically have values listed somewhere, but they may be outdated, unknown to staff, or disconnected from reality.

This step establishes a shared foundation. Without shared clarity on what values matter to your organization now, any attempt to live them in practice will be fragmented or symbolic.

Walk away with a set of core values, value statements, principles, and behaviors that work for your organization.



tip

WHEN TO USE THIS STEP & WHAT TO EXPECT

- Your values feel outdated or vague
- Staff interpret them differently
- You're entering a period of change
- Conversations about values feel circular or stuck

A note on depth:

Clarifying values can take weeks or months – especially when tied to identity, power, or culture. That's not a failure. It's a sign the work matters.

This workbook offers a structured starting point. It is not a substitute for deep facilitation, but it can help unblock conversations and create shared language for moving forward.

STEP
1.1

Conduct an Audit of Your Current Values

Why start with an audit? Values don't exist in the abstract – they carry histories, assumptions, and power. This audit helps you examine not just **what** your values are, but **how** they've been understood and used over time.

The goal is not to judge past choices, but to understand whether your current values still serve the organization you are becoming – and whether people recognize themselves in them today.

Reflection Prompts:

- Do we have written organizational values?
- When were they last reviewed or stress-tested?
- Whose voices have shaped our values so far?
- Whose voices are missing, and how will we bring them in?
- Do these values reflect who we are **now** or who we **used to be**?
- Where do they feel aspirational, vague, or performative?
- Do staff know them?
- Do staff know them? Do people actually use them?

Our Current Values	Is It Still Relevant Now?	Do Staff Know It?	Keep / Adapt / Retire

STEP
1.2

Draft or Refine Your Values

With your audit complete, begin articulating the values your organization needs now.

Use the template on the next page to define each core value, the principles that guide it, and the behaviors that make it actionable. Keep it simple and concrete. Values only matter if people can recognize them in daily work.



Use the organizational example later in this workbook for inspiration. You can adopt, adapt, combine, or add values to fit your context.

HOW TO USE THE VALUES TEMPLATE

Each value moves from aspiration to action:



Core Value + Value Statement

What matters most and why.



Principles

The guiding beliefs that shape decisions.



Behaviors

How the value shows up in daily work:

- **Everyday Commitments** – when things are steady
- **Values Under Pressure** – when it's hardest to live them

VALUES TEMPLATE

Most organizations will complete this template for multiple values. Duplicate this page as needed or recreate the template in a format that works best for your team.

Core Value and Value Statement	Principles	Behaviors and Actions
		Everyday Commitments
		Values Under Pressure
		Everyday Commitments
		Values Under Pressure
		Everyday Commitments
		Values Under Pressure

STEP
2

Identify the Gaps

This step helps you understand the distance between intention and reality. It surfaces where values are already showing up, where they break down, and which inherited patterns continue to shape decisions – especially under pressure.

The goal is not diagnosis or judgment, but awareness – noticing patterns in how values show up in practice today. Where are current behaviors helping you move toward your aspirations, and where may they be pulling you in a different direction?

STEP
2.1

Everyday Practices and Lived Behaviors

This activity focuses on what is already happening.

Values show up – or break down – through everyday behaviors, often unconsciously. Before examining systems or futures, this step invites you to notice where your values are already being practiced, where they are strained, and where they feel hardest to live.



WHEN TO USE THIS STEP

tip

- You have values but aren't sure how consistently they're lived
- Decisions don't always reflect stated priorities
- You're noticing recurring tensions or frustration
- You want a shared, non-defensive way to surface patterns



STEP
2.1

Reflection Prompts:

1. Where are we aligned with our values? Where do our practices reinforce our stated values? List examples.
2. Where are we misaligned? Where do our practices contradict our stated values? List behaviors, systems, or habits.
3. Where are our values hardest to live? What behaviors appear when we are under pressure (e.g. control, gatekeeping, speed over inclusion, reliance on hierarchy)? Identify tension points.

STEP
2.2

From What's Happening Now to What We Want to Practice Next

You don't need a comprehensive analysis to begin shifting direction. Noticing a few recurring patterns is often enough. This exercise helps make the gap between current behaviors and desired practices visible.

Current Behaviors List behaviors or patterns that don't always align with our values.	Future Behaviors List corresponding behaviors that better reflect our values.

STEP
3

Live the Values in Practice

This step helps translate values into practice.

Before you start, remember that organizations do not need to embed values everywhere at once. Most organizations start by focusing on one or two entry points rather than tackling everything at once. Start where misalignment is most costly or where momentum already exists.

STEP
3.1

Identify Successes and Opportunities

How are you – and might you – live your values in practice? To answer that question, reflect on the following:

1. Where are values currently being integrated into our organizational systems and culture? What do we want to protect and grow?
2. Where can our values be better integrated into our organizational systems?

You may choose to refer to the list of examples provided in the *Living Our Values Guide* to get you started.



WHEN TO USE THIS STEP

- You're navigating conflict, uncertainty, or high-stakes decisions
- Values feel hardest to live right now
- You want to prepare *before* pressure hits
- You're ready to move from reflection to practical action



STEP
3.2

Develop a Practical Plan

Map out the gaps between your current policies, processes, and practices and a fully values-aligned future state. Then, identify tactical, tangible steps to move you forward, prioritizing as you go.

Area of Practice	Current State	Desired State (values-aligned)	First Steps	Owner
Hiring & Onboarding				
Performance & Development				
Governance & Decision-Making				
Wellbeing & Culture				

STEP
3.3

Consider How You Will Live Your Values Under Pressure

What tensions might make living your values difficult? What will you do when they inevitably arise?

Use this template to plan for how you will live your values during those times when it feels the hardest. Complete the template for each applicable value.

Pressure Point:

Name the situation where it becomes hard to live your values.

Typical Response:

Describe how you / your team / your organization typically responds when the situation arises.

Values-Aligned Response:

Describe what you / your team / your organization could do that would better align with your values.

Supports Needed:

List what policies, norms, or agreements would support a values-aligned response.

STEP
3.4

Enabling Accountability

Accountability is not about policing behavior; it's about making values livable.

In complex systems, people often know what the values are, but lack the support, structures, or permission to act on them. This reflection helps identify where accountability can enable courage, learning, and repair – rather than punish missteps.

Reflection Prompts:

Me: How do I notice when I'm slipping? What helps me notice and course correct?

My team / organization: What systems make it easier or harder to live our values?

My ecosystem: Where do we need shared agreements to avoid misalignment?

WHAT FUTURE ARE WE BUILDING?

Values shape the future we build. This step is less about analysis and more about seeing the big picture. This step invites you to pause, step back, and intentionally choose which future you want to build – and which you want to interrupt.

Reflection Prompts:

What kind of future do our current behaviors moving us toward?

If others copied us, what ecosystem would that create?

Are we embodying the future we say we want?

Operationalizing Living Values: An Organizational Example

This section offers an example of how one organization translated shared values into everyday practice. It is not a template to adopt wholesale, but an illustration of how values can be articulated, discussed, and embedded at the organizational level.

The example below shows how an organization adapted the network-level values from the Living Our Values Guide to fit its own mission, culture, and constraints – paying particular attention to behaviors, decision-making, and accountability in practice.

Use this section as inspiration. Borrow language that resonates, adapt what fits your context, and leave the rest.

Organizational-Level Core Values

Through a participatory process, Organization “A” refreshed their values using the 4-step approach. They audited their existing values, reflected on what was most needed for the future, and articulated behaviors that would make those values actionable in daily work. As part of the process, they referenced the network-level values shared in the Living Our Values Guide – adapting what resonated, rewording where needed, and discarding what didn’t fit. The result was a set of organizational values grounded in their specific context, culture, and constraints.





Values Under Pressure

Behaviors that matter most when it is hardest to live our values.

Core Value

We stand together to shift power and make space for everyone.

(Equity in Action)

How These Values Show Up in Practice

- We make decisions collaboratively and share power transparently.
- We center diverse, impacted voices and build inclusive, accountable relationships.
- We celebrate shared success and give credit where it's due.
- We actively check bias and step back when needed
-  We accept critical feedback without defensiveness – and act on it.
-  We avoid dominating spaces where we need to be humble, listen, and be in solidarity.
-  We resist risk-averse behavior that avoids discomfort but causes long-term harm.

We do the right thing, even when it's hard

(Integrity & Courage)

- We follow through on commitments, even when it's inconvenient.
- We hold ourselves and each other accountable with compassion.
- We make space for honesty over perfection.
- We build relationships that are respectful, mutual, and non-extractive.
-  We speak up when something feels off – even to those in power.
-  We align internal behaviors with external advocacy – walking the talk, not just talking it.
-  We stay rooted in values when navigating gray areas or competing priorities.
-  We acknowledge and repair harm when we fall short of our values.

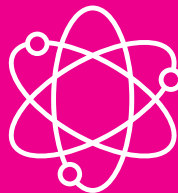
Core Value

We stay curious and keep learning

(Curiosity)

How These Values Show Up in Practice

- We build participatory processes that invite co-learning.
 - We reflect after key moments and adapt based on feedback.
 - We admit when we don't know something.
 - We prioritize listening and learning.
 - We stay open to being changed by what we hear.
-  We resist the urge to default to the loudest or most familiar voices.
-  We stay curious even when a situation feels uncomfortable or uncertain.
-  We let go of rigid thinking or "the way it's always been done."
-  We intentionally create spaces to reflect on how our approaches may be challenged.
-  We ask the hard questions before jumping right to solutions.



Reflection Prompt Sheets

The reflection prompts below were developed by Organization A to support ongoing sensemaking and accountability. They were used in leadership discussions, team conversations, and individual reflection – not as one-time exercises, but as recurring check-ins over time.

You can adapt these prompts for different settings (e.g. retreats, performance conversations, board discussions) or select a small number to revisit regularly.

Organizational Sensemaking

Use these questions to guide leadership, board, or team conversations on how we are living our shared values. These prompts are designed to support honest reflection, identify strengths, and surface opportunities for alignment.

EQUITY IN ACTION:

We stand together to shift power and make space for everyone.

- Whose voices are shaping our strategy, decisions, and messaging?
- How are we redistributing power internally and with partners?
- Where might we be unintentionally excluding, gatekeeping, or reinforcing hierarchy?
- Do we have the structures in place to repair harm when it happens?

INTEGRITY & COURAGE:

We do the right thing, even when it's hard.

- Are we holding ourselves publicly accountable to our values?
- When we fall short, do we acknowledge and address it – or avoid it?
- How do we make room for dissent, truth-telling, and honest feedback?
- Are our policies aligned with our values, even when they cost us?

CURIOSITY:

We stay curious and keep learning.

- Do our processes encourage reflection, learning, and adaptation?
- Are we truly listening to feedback, or just collecting it?
- Do we invite challenge and new perspectives from outside the usual voices?
- How do we resource and prioritize learning in our work?

Individual Reflection

Use these questions in 1:1 check-ins, performance reviews, or self-reflection exercises. Choose 1–2 questions per value to focus each session.

EQUITY IN ACTION:

We stand together to shift power and make space for everyone.

- How am I making space for others to lead or influence?
- Where have I meaningfully shared power or decision-making?
- What actions have I taken to build trust across difference?

INTEGRITY & COURAGE:

We do the right thing, even when it's hard.

- When did I last speak up about something uncomfortable or unjust?
- Do I follow through on commitments, especially the hard ones?
- How do I respond when I make a mistake?

CURIOSITY:

We stay curious and keep learning.

- What have I learned recently that changed how I think or work?
- When was the last time I asked for feedback and acted on it?
- Do I create space to reflect and adapt based on what I hear?

Optional closing question:

Which value do I want to lean into more in the next 3 months? Why?

Policy & Practice Integration

Finally, Organization A identified areas to integrate their core values into standard policies and practices. It is important to note that this will not happen overnight. Organizations rarely integrate values across all systems at once. Most start with one or two leverage points where misalignment is most costly or momentum already exists.

Hiring & Onboarding

Policy/Practice:

- Values-based interview questions: Include questions that explore alignment with values like equity, curiosity, or integrity (e.g., “Tell us about a time you named harm or power imbalance at work. What did you learn?”).
- Candidate assessment rubric includes “values alignment” as a distinct criterion.
- Onboarding orientation includes a deep dive into values, including real scenarios, not just posters or slide decks.
- New hire reflection: Ask within 30/60/90 days: “Where have you seen our values in action? Where not?”

Performance & Development

Policy/Practice:

- Integrate values into performance review templates using prompts like those in your reflection tool.
- Require self-reflection and supervisor feedback on values-based behaviors (e.g., “Describe a moment you led with courage this quarter.”).
- Promotion and advancement decisions include evidence of living the values – not just technical output.
- 360 feedback processes invite peers to reflect on how the person embodies values like trust, collaboration, or learning.

Feedback & Accountability Culture

Policy/Practice:

- Clear definitions of what each value looks like and doesn't – used in training and conflict resolution.
- Create a "Values in Action" feedback form or virtual communication channel where team members can name when someone modeled a core value well.
- Include values-based repair protocols: "If someone's behavior goes against our values, here's how we move toward accountability and repair."
- Conflict resolution policy refers explicitly to the core values (e.g., "How did equity, dignity, or trust show up or break down in this conflict?")

Governance, Strategy & Decision-Making

Policy/Practice:

- Decision-making protocols include a values check (e.g., "How does this decision reflect our commitment to equity and integrity?").
- Strategic planning includes space to review: Are we designing for our values? Who are we centering?
- Annual values audit: Leadership and teams reflect annually on where values showed up – or didn't – in strategy, culture, and decisions.

Wellbeing & Culture

Policy/Practice:

- Offer learning stipends or time to explore topics related to values (feminist practice, systems thinking, local leadership).
- Burnout prevention and boundaries are framed as dignity and equity issues – not just HR logistics.
- Include collective pause and reflection time (monthly or quarterly) to check in: How are we living our values right now?



ABOUT HUMENTUM

Humentum helps unlock effective nonprofit management. With over 300 learning offerings, a solutions-focused membership platform, and deep consulting experience in funding and finance; governance, compliance, and risk; and leadership and strategy, Humentum has strengthened thousands of NGOs, nonprofits, and their funders across the globe to become more resilient and sustainable.



ABOUT TIME

The TIME Transformation Lab is a collaboration-based initiative led by Humentum that brings together INGOs, CSOs, networks, and funders to explore and test what transformation looks like in practice. TIME helps actors navigate disruption and possibility by creating spaces for reflection and experimentation, and by co-creating practical tools that strengthen resilience, equity, and organizational change. Its learning spreads through networks and new contexts, creating ripple effects across the sector. Through its **Working Out Loud** approach, TIME shares insights in real time so others can adopt, adapt, and apply them.

To stay connected to this work, [sign up here](#).