# Strategic Planning: Drafting Organizational Values Meeting

## Goal

Draft organizational values

Works best with 6 or fewer participants.

## Duration

60+ minutes

## Agenda

### 1.0 Welcome (5 minutes)

Purpose of meeting, expectations, outcomes.

### 2.0 Understanding Values Statements (15 minutes)

Discuss: What are organizational values and why do we need them? What can we learn from organizations that publish their values?

### 3.0 Individual Brainstorming (5 minutes)

Silent brainstorming words or phrases that describe the principles that are most important to the organization’s work. How will we behave with each other, with stakeholders? What do we stand for? What is best about our organizational culture? Individuals write their ideas in a private document for the allotted time.

### 4.0 Review Values Themes (15 minutes)

Individuals post/share their written ideas on a collaborative document. The team reviews the concepts together, identifying themes/commonalities, and clarifying meaning.

### 5.0 Prioritize Concepts (10 minutes)

Agree as a group on the most important concepts or themes. Which themes were most dominant? Which concepts resonate?

### 6.0 Draft Options (15 minutes)

As a team, choose the 3-5 values that are strongest.

### 7.0 Review and Close (5 minutes)

Agree on the process for finalizing the values. I.e. one or two people should be responsible for finalizing and publishing the values.

Note that the next step in the strategic planning process is to identify the handful of goals on which we will focus. Note the prep work required of all participants for the next meeting.

## Resources

### Overview

Read about this meeting in The Complete Toolkit for Strategic Planning with Remote Teams

<http://www.lucidmeetings.com/templates/complete-toolkit-strategic-planning-remote-teams>

### How-To Guide and Template

Online meeting template with full 35-page Facilitator’s Guide *(Lucid Meetings account required)*

<https://meet.lucidmeetings.com/meeting_template/3120>