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## An Exploration of Core Values and Values Congruence in Local Public Health

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# An Exploration of Core Values and Values Congruence in Local Public Health

## Abstract

**Background:** Understanding and aligning staff core values with organizational values has been shown to contribute to positive work attitudes and increased organizational performance in the private sector. Little is known about the role of values in local public health.

**Purpose:** To identify public health staff core values, and to improve the alignment between staff values and organizational values (known as values congruence).

**Methods:** A Tribal Leadership exercise was used as part of a multi-stage strategic planning process at Canada's largest autonomous local public health agency.

**Results:** Five sessions were held with 146 public health staff; 156 different values were reported. These were narrowed down to four core values: collaboration, integrity, empowerment, and striving for excellence. Staff reported high levels of satisfaction with the process and its outcome.

**Implications:** This exploratory case study suggests the Mountains and Valleys exercise can be valuable for assessing public health staff core values, and enhancing values congruence. Further research is needed to explore the relationship between public health values and performance.

## Keywords

core values, organizational values, public health, strategic planning, work attitudes

## Cover Page Footnote

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## INTRODUCTION

Public health is a value-laden profession. For example, public health recognizes the rights of a population over those of individuals (i.e., the prevention paradox).<sup>1</sup> Practitioners may be drawn to the field because of its values.<sup>2</sup> In the private sector, leaders are advised to understand the core values of their employees since values “silently give direction to the hundreds of decisions made at all levels of the organization every day.”<sup>3</sup> Leaders are also encouraged to strive for values congruence (i.e., alignment between the organization’s expressed values and the personal values of staff) as it has been shown to contribute to positive work attitudes and increased organizational performance.<sup>3</sup> Unfortunately, given their importance, relatively little has been published about the core values that motivate local public health practitioners.

Personal values assessment and ensuring values congruence are challenging tasks. Discussing core values can be a deeply personal activity, which can be uncomfortable in a work setting. Further challenges arise because the words used to convey values may be understood differently by others. To improve clarity and understanding, personal stories can be an effective vehicle to communicate values.<sup>4</sup>

This exploratory case study used a tribal leadership approach in an attempt to (1) identify the core values of staff at Canada’s largest autonomous local public health agency, and (2) improve values congruence at that public health agency. Tribal leadership is a popular management philosophy that aims to improve organizational performance through organizational culture assessment and alignment.<sup>4</sup> According to tribal leadership, leaders can improve performance and employee satisfaction by (1) identifying naturally occurring groups within their organization (a.k.a., tribes); (2) understanding the personal and shared values of groups; and (3) improving values congruence.<sup>4</sup> A popular tribal leadership tool for identifying core values is the Mountains and Valleys exercise.<sup>5</sup> This exercise involves recalling high and low experiences of one’s life and then determining the top 3–5 values that were present or absent, respectively, during those experiences.

## METHODS

The study was conducted at the Middlesex-London Health Unit (MLHU), situated within Ontario, Canada. MLHU is the largest autonomous local public health agency in Canada (all larger agencies are departments within governments). MLHU delivers core services mandated by provincial standards, similar to the ten essential public health services in the U.S. MLHU serves an urban–rural population of ~439,000. All MLHU staff (N=275) were invited to participate in one of five half-day strategic planning sessions. Managers and executives actively encouraged staff participation. Participants were sent the Mountains and Valleys exercises and instructions 1 week prior to each session. Participants were asked to complete the exercise prior to the session, and were informed that they would discuss their results (as generically or specifically as they liked) in small groups. At each session, small groups (4–6 staff) discussed and recorded the core values of each staff member. Groups also identified the most commonly-reported values. Each group reported their most common responses to all participants. As responses were reported, the facilitator recorded and displayed the responses on a projection screen for all to see. Responses from all groups were then discussed as a whole. Trends and themes were discussed, as well as the most popular core values shared by session participants. All sessions participants then discussed which values were applicable as organizational values.

Following session facilitation, data were first analysed collectively by the participants (as described above). Results and qualitative notes from all sessions were then analysed. Results were then sent to an interdisciplinary staff strategic planning committee for validation and final review. Finally, all participants were sent an anonymous online survey regarding their satisfaction with the exercise. An organizational psychology professor assisted with study design. Ethics board permission was not sought as this study involved staff engaged in their normal duties as part of strategic planning. Mountains and Valleys is a freely-available, nonproprietary assessment tool.<sup>5</sup>

### Chart 1. Process stages

#### Before Session

- M&V sent to all session participants

#### Session Process

- Session participants form small groups ( $n=4-6$ )
- Participants share M&V results (i.e., core personal values) with others within small group
- Each small group identifies most commonly-reported values
- Each small group reports most common commonly-reported values to all session participants
- Most commonly-reported values from all participants identified
- Trends, themes and relation to current organizational values discussed

#### Values Aggregation & Alignment Process

- Results of each session (most commonly-reported values and discussion notes) aggregated
- Results reviewed by interdisciplinary committee over multiple meetings to identify potential core organizational values
- Committee members consulted staff at team meetings regarding potential core organizational values
- Committee finalized draft core values, for approval by senior leadership team and Board of Health

M&V, Mountains and Valley's exercise

## RESULTS

The five sessions involved 146 participants (53% participation rate). Participant representation was balanced across departments and occupational groups (i.e., front line, clerical, management and executive).

**Core Values.** Participants provided 544 responses regarding their core values. These included 156 unique responses. Items reported by  $\geq 1\%$  of participants are reported in Table 1. *Family* was the most commonly-reported core value by participants ( $n=70$ ). *Family* was most often reported on its own, but was linked by other participants with *security*, *work-life balance*, *health*, *sense of belonging*, and *safety*. *Accomplishment* (or *sense of accomplishment*) and *honesty* tied as the second most commonly-reported core values ( $n=40$ ). The phrase *striving for excellence* was used interchangeably with *accomplishment* in two sessions. Many participants debated the relationship between *honesty* and other popular values such as *respect* and *integrity*.

**Table 1. Values mentioned by >1% of public health staff**

Value	<i>n</i>	% of total
Family	70	6.4
Accomplishment	40	3.7
Honesty	40	3.7
Respect	36	3.3
Happiness	32	2.9
Security	32	2.9
Integrity	24	2.2
Responsibility	20	1.8
Ambition	17	1.6
Friendship	17	1.6
Love	17	1.6
Balance	16	1.5
Hard work	16	1.5
Independence	16	1.5
Trust	15	1.4
Helpfulness	13	1.2
Peace	13	1.2
Courageous	12	1.1
Wisdom	12	1.1
Faith	11	1.0
Health	11	1.0

**Values Congruence.** Aligning staff and organizational values was an iterative process. Group discussions, session discussions, follow-up analysis, and validation with the strategic planning committee were all important stages in (1) refining the list of values into a small set of core values, and (2) ensuring values congruence between what was important to staff and what was important for MLHU. The final aligned core values for MLHU were *collaboration, integrity, empowerment, and striving for excellence*. Staff reported that each core value contained several subvalues. For example, *striving for excellence* contained the values of *innovation, work–life balance, accomplishment, and professionalism*. *Work–life balance* is an example of how staff translated the popular value of *family* into an organizational context.

**Satisfaction.** Of the 146 participants, 109 responded to the satisfaction survey (75% response rate representing 40% of MLHU staff). The vast majority (92%) reported that the exercise was good or excellent (Table 2). The qualitative comments reinforced these results, indicating staff appreciated their personal values being considered, and that the core organizational values resonated more with staff compared with the previous list of MLHU values. Although some staff expressed anxiety prior to attending the sessions, they reported an appreciation for the opportunity to discuss personal stories with colleagues.

**Table 2. Participant satisfaction with Mountains and Valleys exercise**

Rating	n (%)
Excellent	62 (57)
Good	38 (35)
Fair	8 (7)
Poor	1 (1)
Total	109 (100)

## IMPLICATIONS

These results suggest that the Mountains and Valleys exercise can be a valuable tool to assess public health staff personal core values, and to facilitate discussions about values congruence. Notably absent were values fundamental to the work of public health, including *health* and *equity*. While this is most likely due to the personal nature of the exercise, it does not necessarily prevent value congruence. In fact, it is likely that the personal values listed are related to the higher-order values found in public health. Public health values were endorsed by staff through other processes, and included in the final version of the strategic plan. Public health practitioners must balance the importance of evidence-based work with the realities of time pressures and capacity. We encourage those interested in completing a similar process to consider this balance, and strive to be evidence-based in their approach. We would also suggest that other groups attempting this process try to specifically probe for public health values. There could also be value in adjusting the wording of the exercise to better reflect public health context; however, this would need to be balanced off with the challenge of then being too leading of an exercise, where staff felt they ought to have public health values as part of their own personal values.

Far from an exact science, this case study reports one attempt to improve values congruence in local public health, an important topic that has received limited research attention. Further research is required to determine (1) optimal approaches to improving values congruence and (2) whether the benefits of values congruence reported in the private sector can be replicated in local public health settings. There is also value in further evaluation of the Mountains and Valley's exercise; we hope that as more organizations use this approach, we will be able to learn from them and work toward a more comprehensive evaluation.

## SUMMARY BOX

**What is already known about this topic?** Core personal values inform our decisions and behaviours in the workplace. Values congruence (i.e., alignment between the organization's expressed values and the personal values of staff) has been shown to contribute to positive work attitudes and increased organizational performance in the private sector.

**What is added by this report?** This exploratory case study used a tribal leadership approach in an attempt to identify the core values of staff at Canada's largest autonomous local public health agency and to improve values congruence at that public health agency.

**What are the implications for public health practice, policy, and research?** This case study reports one attempt to improve values congruence in local public health. Further research is required to determine optimal approaches to improving values congruence and whether the benefits of values congruence reported in the private sector can be replicated in local public health settings.

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