



# **Organisational Values Self-Assessment Tool**

*Faith in Action*

EU-CORD has developed this self-assessment exercise to help your organisation assess how you are meeting your organisational values in practice.

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## Introduction

As faith-based actors, EU-CORD members are keen to explore how Christian identity is reflected in our organisations and how we communicate the added value to our donors and other stakeholders. One way in which we express this is through our values. Many EU-CORD members publish values, but few carry out surveys to assess how well they are performing against them.

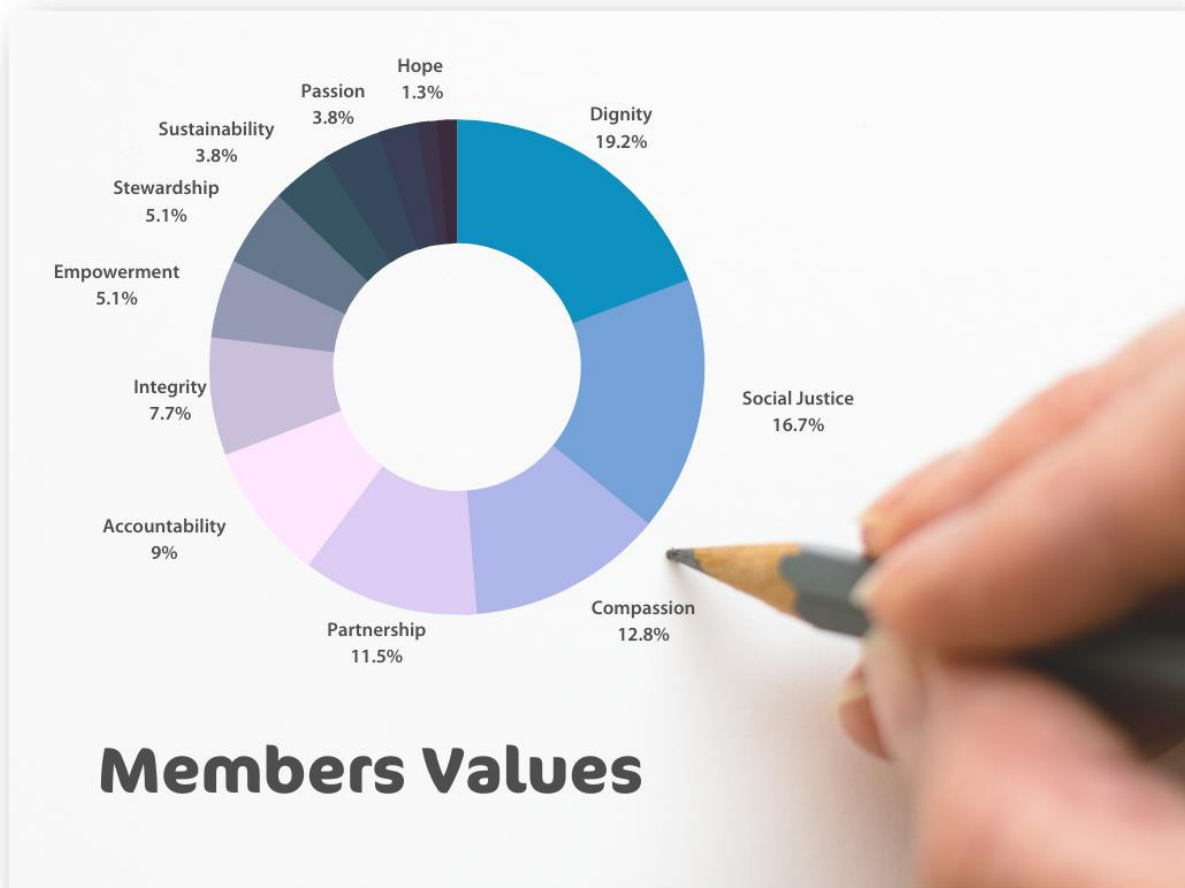
One organisation which has invested significantly in 'Values Surveys' is Medair, whose experience and expertise have informed this exercise. Taking this as a starting point, EU-CORD's Faith in Action programme has developed this 'values self-assessment tool'. The tool is comprised of two parts: (i) how to use the tool and (ii) a set of generic survey questions.

## Benefits

- Values surveys focus on the organisation's values and assess whether others – staff, target groups, other stakeholders are experiencing your values in practice.
- Values survey can be repeated, perhaps annually, which allows for assessment of whether improvement is taking place.
- Such a survey can show which values are strongly characteristic of your organisation and which need strengthening.
- The process provides an opportunity to show accountability, both internally and externally, as an organisation.
- By asking for ideas for improving performance, a valuable source of innovation is accessed.
- As we seek new ways to engage with target groups, here is an opportunity to ask for feedback that everyone, no matter what ethnic group, gender, disability or none, or religious background.

## Members' Values

The generic values survey considers the values most frequently used by EU-CORD members and proposes a set of statements that organisations can use to evaluate each value. A review of member values identified the ten core values regularly used. These are illustrated in the following graph.



## The Values Self-Assessment Tool

The values assessment is based on a questionnaire format (survey). It has been designed in such a way that organisations can adapt the tool to fit their needs.

### *How do I tailor the survey to fit my organisation?*

When an organisation wants to create a survey, the questions relating to that organisation's values can be selected, cut, and pasted into the survey. The questions can be amended, and new ones added according to your preferences. The survey questions in Annex 1 are designed to get you started.

### *What is the scope of the survey?*

The survey can be implemented organisation-wide, or you can target a specific country or stakeholder group.

### *Should we run a pilot test?*

It is recommended to pilot the survey questions and methodology, especially if the survey is translated into different languages or carried out in different cultural contexts. This also provides an opportunity to analyse the understanding of the questions and that the data collected gives you the type of analysis you are looking for.

### *How many responses should we aim for?*

Your survey is statistically significant when it is large enough to represent the population sample being surveyed accurately.

You need to judge for yourselves the number of respondents needed for you to trust your survey results; this will also be determined by what you intend to do with the results. If you are making major business or financial decisions based on the data, then you want to have a data set as accurate as possible.

For this survey, you might find it helpful to look at response variance. If you begin your survey and the responses are all very similar, then perhaps you don't need to continue the survey. If the answers are vastly different, you might continue with the survey, polling more and more of your population. If the variance is large, you will continue to survey for more statistical significance.

### *How often should we run the survey?*

It is recommended that the questions used be repeated every 3-4 years to maintain evidence of continuous improvement.

### ***Who completes the survey?***

This is down to organisational preference but could include:

- Target population groups (households, individuals)
- Employees
- National and international implementing partners
- Donors

### ***How are responses collected?***

Responses can be collected in a variety of ways but for the purposes of analysis, and they will need to be collated into a single data collection tool. Most survey platforms will let respondents take the questionnaire via an online link or through a form that can be used offline and then uploaded. The forms could be uploaded by a third party, but this would take away the anonymous nature of the survey (unless the third party was external to the organisation).

### ***Self-Administered or Facilitator led***

For individuals who will complete the survey online, they should be sent a link to the survey and any relevant guidance notes to help them complete the document. In some cases, it will be necessary to have a facilitator lead a beneficiary, or group of beneficiaries, through the survey questions. In this case, the facilitator will need training and guidance notes to help them. An example of facilitator guidance can be found in Annex 2.

### ***Disability Accessible Survey***

It is good practice to ensure that your methodology and data platform are accessible to persons with disabilities. Click the following link for the [ISO standard for Web Content Accessibility Guidelines](#). The six best question types for accessible surveys are drop-down, single select, multiple select, grids, number box and text box. Likewise, when providing analysis, consider the readability of graphs, use of colour etc.

### ***What kind of software can I use?***

While the survey can be undertaken face to face, it does lend itself to online completion and analysis of results. There are many platforms available which range in cost, data collection method and how data can be analysed. While there are simple tools and free tools available such as Google Form or Survey Forms in Office 365, they may miss out on some functionality that might be useful to you. For example, if you share a survey in more than one language, it will be useful to have one entry point through which responses will be collected rather than creating a single survey for each different language. Medair uses Ona, a

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*Jotform is an intuitive, cost-effective survey platform that supports multiple language questionnaires and meets disability accessibility requirements.*

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reasonably high-end data tool, while the EU-CORD Secretariat has good experiences with Jotform.

***What about confidentiality?***

The survey should not collect personally identifying information such as name, email address, or IP address. Therefore, unless volunteered, responses are anonymous, and no one will know who participated in the study. It may be helpful to collect limited information about each respondent's role and location, but only to group, analyse, and act on responses.

Further improvement comments may be anonymously quoted for the benefit of analysis and further improvement actions. It is best to shorten the quotes to make sure they cannot be attributed to a specific responder.

## Implementing the tool

### *Getting Started*

1. Define the scope and methodology: purpose, objectives, target groups, key questions to be answered, timeframe etc.
2. Develop the survey questions: *more on working with the generic questions is outlined below.*
3. Put the questions in your survey tool to finalise their design.
4. Run a pilot test:
  - a. Are the questions understood?
  - b. Does the survey coding give you the necessary results?
  - c. Is the information aggregated in a way that is useful to you?
5. Finalise the survey questions.
6. Develop guidance notes and any necessary training materials.

### *Launching the Survey*

7. Before launching the survey, consider the communication process needed to help responders complete the questionnaire: *why are you asking them to complete the questionnaire? How long should it take to complete? Will they receive feedback on the results?*

### *Analysis and Communicating the Results*

8. Include in your initial scope and methodology some reflection on how the analysis will be shared.
9. It is good practice to communicate the results of the survey with those who took part. If your survey is anonymous, you could, at the very least, share feedback via your website.

## Using the Generic Survey Questions

A sample of list of generic questions has been provided. You can use and adapt these questions to suit your context. It is recommended that you first design your questions in a Word format so they can be easily amended and reviewed before you code them in your data collection tool. The survey takes ten values and offers a set of statements to measure each value, with the respondent asked where they position themselves between 'Strong disagree' and 'Strongly agree' with a 'Don't know' option also provided.

The survey is structured in two parts.

A: Information about the respondent. *There are two streams of questions:*

- Where the respondent is an employee
- Where the respondent is another individual (stakeholder) or participating as part of a focus group

B: Value survey questions

*Notes to consider*

- Know why you are asking the question – will the data collected be relevant in answering the questions you have?
- There may be some questions relating to age/gender where you might want to include a 'rather not say' category.

*When developing the survey, consider how it will be coded.* How you code a question will also impact how the data is collected for analysis.

- Drop-down lists: allow for consistency of analysis
- Single or multiple choice?

## Annexe 1: Generic Survey Questions

[Please select the questions you want to use for your values and cut and paste into your survey document. The options shown in blue are suggested for drop-down selection and should be edited according to the organisation's requirements. Depending on your organisation you may wish to further desegregated your data – for example, to include information on people with disabilities, faith groups etc.]

### Introductory Questions

#### Section A – Where this is an employee survey

#### Initial information about the respondent:

Ask respondents to complete some information about themselves. This will allow meaningful analysis of responses when evaluated together with those of colleagues.

1. Country you work in:

*Select from the drop-down options:*

2. What is your gender?

*Select from the drop-down options:*

Male

Female

I'd rather not say

3. How old are you?

*Select from the drop-down options:*

Less than 18

18-24

25-34

35-44

45-54

55 or older

Rather not say

4. How many years have your worked with our organisation?

*Select from the drop-down options:*

Less than 1

1-2

3-5

- 6-10
- 11-15
- 16 or more

5. How many years have you worked in humanitarian or development sectors?

*Select from the drop-down options:*

- Less than 1
- 1-2
- 3-5
- 6-10
- 11-15
- 16 or more

6. What type of employment contract do you have?

*Select from the drop-down options:*

- Full-time
- Part-time
- Intern
- Volunteer
- Consultant
- Not applicable

7. Do you work at Head Office?

*Select from the drop-down options:*

- Yes
- No

8. What is your primary function?

*Select from the drop-down options:*

- Programmes
- Human Resources
- Finance
- Logistics
- IT
- Communications
- Management
- Board

## Section A – Where this is another type of respondent

[The following sets of introductory questions can be used where the respondent is not an employee of your organisation. There are two set of questions presented. One for individual respondents and one where the questions target a focus group].

*Again, select and adapt these questions according to your requirements.*

### Individual Respondent

1. In which country are you located?  
*Select from the drop-down options:*
2. How many years have you known the organisation being assessed?  
*Select from the drop-down options:*

Less than 1

1-2

3-5

6-10

11-15

16 or more

3. What is your gender?  
*Select from the drop-down options:*

Male

Female

I'd rather not say

4. Do you identify as any of the following?  
*Select from the following multiple-choice options:*

National CBO / CSO (community-based organisation, civil society organisation)

OPD (organisation of persons with disability)

FBO (faith-based organisation)

International NGO or network

Donor government / funding agency

Private supporter

Foundation

Private sector / business

### Focus Group Discussion

1. In which country are you located?

*Select from the drop-down options:*

2. How many years have you known the organisation being assessed?

*Select from the drop-down options:*

Less than 1

1-2

3-5

6-10

11-15

16 or more

3. What is the gender profile of the group?

[Depending on your software, you may have to split this question into separate parts if you want to collect gender profile for example, number of men, women]

Male

Female

Rather not say

4. Do you identify as any of the following?

*Select from the following multiple-choice options:*

National CBO / CSO

OPD

International NGO or network

Donor government / funding agency

Private supporter

Foundation

Private sector / business

## Section B – Generic Values Survey Questions

[Ten sets of questions have been developed to assess the values most common to EU-CORD members. To design your own survey set, select the question relating to the values your organisation uses. These are your questions, so adapt as necessary. You can also use these as a basis to develop questions specific relating to your organisation. In some cases, we have proposed specific formulations to reflect humanitarian or development programming or where the question is aimed at a particular target group.

Some of the language is still very humanitarian orientated for example 'needs' and 'beneficiaries' – you will need to adapt these for a non-humanitarian context].

### Dignity

"We believe that each person has been made in God's image and is therefore uniquely valuable and worthy of the highest respect. Consequently, we reach out to all **those in need**, irrespective of their race, gender, religion, age, or nationality. Wherever possible we personalise our assistance, taking individual needs and circumstances into account, and respecting the dignity and independence of the people we serve."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. [Organisation] treats you with the highest respect.						
2. We treat <b>those in need</b> with the highest respect.						
3. We adapt our <b>assistance</b> to the local context and to people's individual needs and circumstances.						
4. We reach out to people based on need, regardless of race, gender, religion, etc.						

### Feedback for Dignity

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1, 2, 3 or 4.

*Open text box*

**Social Justice / Inclusion / Impartiality**

"We endeavour to reflect positive social justice attitudes in our work through being aware of the need for inclusion for women, girls, persons with disabilities, and the marginalised without showing favour."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We include all recognising the equal status of women, girls, persons with disabilities and the marginalised.						
2. We respond positively to the needs and rights of all irrespective of gender, disability, ethnic origin, or religious background.						
3. The work contributes towards achieving better social justice in communities.						

**Feedback for Impartiality, Inclusion and Social Justice**

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1, 2 or 3.

*Open text box*

*Compassion*

**For humanitarian programmes**

"We desire to relieve human suffering in times of crisis, disaster, and conflict. We seek out people who are the most vulnerable, come alongside them and offer practical support."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We come alongside the most vulnerable, offering them practical support.						
2. Staff sincerely care about the people we serve.						

**For development programmes**

"We seek to support people and enable them to flourish and gain resilience."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We come alongside <b>beneficiaries</b> providing support to build resilience.						
2. Staff sincerely care about the people we serve.						

**Feedback for Compassion**

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1 or 2.

*Open text box*



### Partnership

"You are regarded as a valued partner in the programme where you have the opportunity to be heard, to share your opinion and feel that your views are taken into account."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We provide opportunities for you to express your ideas, views and opinions.						
2. You believe that your views are listened to and taken into account.						
3. You are regarded as a valued partner.						

### Feedback for Partnership

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1, 2 or 3.

*Open text box*

### Accountability

"We make ourselves accountable to our supporters, our staff, and those we serve, and seek input from them to help us improve our activities and procedures."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We make ourselves accountable to those we serve and seek their input to help us improve.						
2. We seek your input on decisions that affect						

you and seek to improve.						
3. We effectively communicate with those we serve about successes and uncomfortable issues.						

**Feedback for Accountability**

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1, 2 or 3.

*Open text box*

*Integrity*

"We strive to live out our values and principles consistently at every level of the organisation, and in every location – from the remotest team to the international headquarters. Our desire is that as we work together in teams, our attitudes, words, and actions will be true to our vision and character."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. Leaders and managers live out our values and principles.						
2. Team members live out our values and principles.						
3. We are honest and fair. It acts to prevent or stop abuse and corruption by our staff.						
4. I know what is in the Code of Ethics policy (employees only).						
5. Personal conflicts are resolved/addressed in an honest,						

constructive, and fair way.						
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### Feedback for Integrity

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1, 2, 3, 4 or 5.

<i>Open text box</i>
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### Empowerment

#### Question for employees only

"We seek to empower staff and support them within their given sphere of decision-making and influence. We seek to develop people to increase their responsibility and capacities to be effective."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We provide clear guidance of levels of empowerment.						
2. We empower our staff to take decisions and act with initiative within known parameters and are supported.						

#### Question for other stakeholders

"[Organisation] seeks to empower staff".

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. Staff respond effectively to needs without referral.						

2. Staff take good decisions.						
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**Feedback for Empowerment**

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1 or 2.

<i>Open text box</i>
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### Stewardship

"Staff of [organisation] are responsible in their use of resources".

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. Staff of [organisation] are responsible in the management of resources.						
2. [Organisation] seeks ways to improve use of resources to benefit <b>beneficiaries</b> in the most suitable ways.						

### Feedback for Stewardship

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1 or 2.

*Open text box*

### Sustainability and Resilience

"We ensure that programmes are implemented to strengthen resilience of people we seek to support. We endeavour to ensure the sustainability of our operations adapting to changing circumstances so that objectives are completed in a timely manner."

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. We act to strengthen the resilience of people so they can adapt to new circumstances and respond to challenges effectively.						
2. We maintain the sustainability of our						

operations through adaptation and implementing in a timely manner.						
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**Feedback for Sustainability and Resilience**

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1 or 2.

*Open text box*

*Hope*

"We seek to bring hope to people devastated by crisis and caught in apparently hopeless situations. Together with the communities we serve, we strive to make sustainable improvements and increase their capacity to build a better future."

**For humanitarian programmes.**

**Please indicate how much you agree with the following statements.**

	Strongly disagree	Disagree	Neutral	Agree	Strongly Agree	Don't Know
1. Our work with people affected by crisis gives them hope for a better future.						
2. Our work with people devastated by crisis increases their capacity to build a better future.						

**Feedback for Hope**

Why did you give the ratings that you did, and how can we do better? Please start with the number of the statement you are referring to, 1 or 2.

*Open text box*

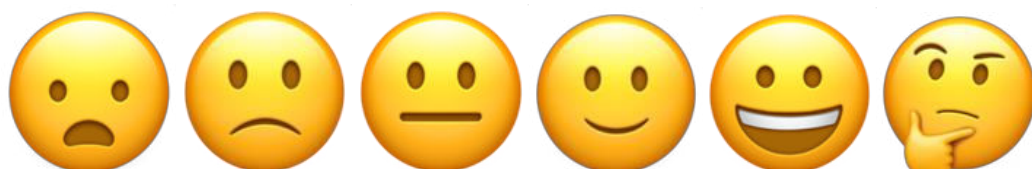
Thank you for your time in completing this survey.



## Annexe 2: Guidance for Focus Groups Enumerator

[This example of guidance for a focus group enumerator was shared by Medair and based on their specific methodology. Adapt as appropriate for your situation].

- Begin the survey by selecting the language, if not English, and fill in the preliminary information about the data collection type, country, date, your name etc.
- Then read (and explain as needed) the contents of the introduction to the person or people you will survey. Be sure they understand that we want their honest feedback and that we will keep their response confidential. If they provide negative feedback, this will not negatively affect them, their family, or their community. Assure them that we want to hear both positive and negative so that we can know where we are strong, where we are weak, and how to improve.
- Ask the respondent(s) if they want to respond to this survey and enter their response. If they say "No," please ask and write down why. If "No," then stop here. If "Yes," then continue with the survey.
- Fill in the requested information about the person/people being surveyed (Section A).
- For a Focus Group Discussion (FGD), enter the group's number of men and women.
- There are rating statements relating to each value. Each follows the same format. We want to know how strongly the beneficiaries agree (or disagree) with each statement.
- If you are conducting an (FGD), after reading out each statement, ask how many people strongly disagree, disagree, are neutral towards, agree, or strongly agree with the statement. Enter the total number of people in each rating category.
- If appropriate, use sad and happy faces to represent the five levels of agreement.



Strongly Disagree    Disagree    Neutral    Agree    Strongly Agree    Don't Know

- One way to do this is to print these faces on paper and to lay these faces in order on a table. Then, give each beneficiary a sticky note, a pebble or other small item. For each question, ask each person to place his or her sticky note or pebble onto one of the faces. After you have counted and entered the number of people who selected each rating, and you have typed in their reasons for their ratings and their ideas for improvement, return one sticky note or pebble to each person before reading the next statement.
- The "Don't Know" response should *only* be used when someone *doesn't know enough* about how the member (or the partner) operates to answer the question fairly. It does *not* mean "neutral".
- During an (FGD) discussion about each statement, please write down in "Discussion notes" key stories or ideas or statements from the beneficiaries that help to understand their response to this statement.
- After entering the rating, ask the interviewee or FGD participants why they gave the rating that they did. Ask them about their personal experience or what they have heard from others about their experience with the organisation being reviewed. Also, ask them how they think the organisation (or the partner) can do better. Type in this feedback in "Why did you give us these ratings?" at the bottom of each rating screen. This field is not mandatory, but we highly recommend getting this input to help understand why people give their ratings. Also, ask how they think we can do better.
- Questions that ask about "you" generally refer not only to the individual but also to their community. For example, "Our organisation gives you hope for a better future" means "Our organisation gives you and your community hope for a better future."
- At the end, please ask for and type in any additional feedback. Then thank the participants for their time and feedback and remind them that we will keep their responses confidential and that we will make improvements based on what we learn. Finally, submit the survey.