

# Worksheet for Recording Critical Stories and Developing Statements of Core, Deeply Held Beliefs

## Instructions/Setting the Stage

- Remember stories are more than just facts. They have people (real people with experiences and motivations), doing things that then lead to other experiences...
- Those who are interviewing are trying to uncover the story. It doesn't really matter if it is fully accurate, it is the basic narrative that matters.
- As an interviewer, you don't have an opinion, you are just curious.

## Recording a Creation Story

- Tell me a bit about how and when the organization was created?
- Organization Name (when founded)
- When was this? Year
- Who (be very specific)
- Why both stated and any stories that are told about why?
- What was the impetus?
- What actually happened to form the organization?
- What was the first success during/after creation?
- Any important trends in broader world at time?

## Recording a survival or pivot story

- What was the opportunity or threat to the organization?
- What was the initial response?
- Who was leading the response?
- If opportunity, how did the organization end up taking it on?
- How long ago was this?
- What happened ? (give some detail—who did what?)
- What seems to be the “lesson” that the organization learned from the experience (not what they should have learned, but what they actually seemed to have learned and internalized)?

## Conflict in Espoused Values and Behavior

Is there a specific example of the organization saying one thing but doing another? If so, very specifically describe the situation and whatever reasons people give for the difference? Try not to let the description be vague or cliché. Would this example be widely recognized within the agency?



<p><b>Organization Culture questions suggested by Community Based Service Nonprofits formed in 1960/early 70s.</b></p>	<p><b>List Possible “Beliefs” at the heart of Organizational Culture as suggested by:</b></p> <ul style="list-style-type: none"> <li>• <b>Survival or Pivot Stories</b></li> <li>• <b>Creation Story</b></li> <li>• <b>Differences in Espoused Values versus Behavior</b></li> </ul>
<p><b>Ambiguous relationships with government.</b> To what extent are government funders the “primary customer” of the agency? How does agency approach disagreements with major funders about program operations?</p>	
<p>How does organization approach applying for consistent funding sources? Monitoring?</p>	
<p>What role does innovation in program development and delivery play at the agency?</p>	
<p><b>Equity and Fairness.</b> What is the ‘right’ way to determine where the organization spends its scarce resources and time?</p>	
<p>Should the organization serve as many people as possible or facilitate as much “change”/improvement as possible?</p>	
<p>Those with most need? Those with motivation? Those able to make change? Those in crisis?</p>	
<p>What is the organization’s overall engagement / approach/ understanding of the role of “the market” in determining people’s quality of life?</p>	
<p><b>Social Justice and “Hero Mentality”</b> Does the organization see itself as “saving” people in need?</p>	
<p>What are the assumptions about the people who choose to work at the agency? Why are they there? What is the implication about resource allocation?</p>	
<p><b>Participation and Diversity.</b> Who is assumed to know the “right” set of interventions that will make a difference? Who is engaged in making fundamental decisions about program, resource allocation and changes? Why?</p>	
<p>What is the role of diversity of people and/or experiences in the organization and its decision making processes?</p>	
<p>What does the organization’s behavior suggest about its beliefs about the role of risk taking? Failure?</p>	

Edited from *Nonprofit Organization Culture Guide: Revealing the Hidden Truths that Impact Performance* by Paige Teegarden, Denice Hinden and Paul Sturm.

<b>Organization Culture Questions (continued)</b>	
What has the organization's experience been in collecting, managing and using data in the decision making process? What does it suggest about beliefs around importance of data?	
What is 'success' for a director/ manager/ frontline staff? How do they know that is success? How are they rewarded? (attah boys)	
Who suggests changes in program, in process, in operations? Who needs to be engaged in discussion of changes? Who has veto power? (think really honestly about directors of departments or programs and their power within the agency)	
<b>More 'general' questions helping to point to Organizational Culture Beliefs</b>	
How to organize to get things done--meetings, individual work, teams, director led, specific guidance/general guidance, etc.? When there was a challenge, what did they do?	
Where is dissent/conflict voiced?	
What kind of information is valid--analysis, statistics, interviews, community voices?	
How do we expect/believe we'll get results in the outside world? What is the "right" way to approach problems/challenges?	
How do people learn about new ideas?	
How is the organization structured? How important is formal structure?	
How are policies and procedures used (or not used)? How are they changed? How are they enforced (i.e. what happens when someone doesn't follow, does it matter who that person is?)	

Edited from ***Nonprofit Organization Culture Guide: Revealing the Hidden Truths that Impact Performance*** by Paige Teegarden, Denice Hinden and Paul Sturm.

## Very Brief Description of GCCAC’s “Hidden Truths”/ Elements of Organizational Culture Analyzed for Benefits and Risks

GCCAC Espoused Beliefs	Benefits—how can beliefs be leveraged and related to change	Risks—ways beliefs act as barriers to change
<p><b>People want to succeed</b></p> <p><b>Everyone deserves a second chance</b></p>	<p>Focus on outcomes/success for customers</p>	<p>Focus on people paramount and lead to under investment in technology and organization to improve</p>
<p><b>People can succeed w- self esteem, knowledge, tools, supports, &amp; oppty for living wage</b></p>	<p>Technology can help us know what customers are eligible for and the other resources available</p>	<p>Can feel like “we already do this” instead of a shift in practice</p>
<p><b>Understand what our clients want, their definitions of success, and then help ..paths to success.</b></p>	<p>Case management tools (technology) can help with this</p>	
<p><b>Creating personal, social connections</b></p>		<p>Technology can be a barrier to personal connection</p>
<p><b>Treated with respect and dignity</b></p>		<p>Knowing all services someone has received can result in lack of respect</p>
<p><b>We will go the extra mile.</b></p>	<p>New structure should enable staff to more easily go the extra mile</p>	<p>Structure creates confusion or resentment</p>

Very Partial List of Unconscious Cultural Beliefs	Benefits—how can beliefs be leveraged and related to change	Risks—ways beliefs act as barriers to change
<b>Partnership and collaboration are critical to our success as an agency.</b>	Can help partners by providing data or being a model.	Spend significant time and money on our capacity and technology reduces focus on partners.
<b>There is little reason to collect any information except what our funders require. Funders are powerful ‘customers’ of agency</b>	Some experience with good quality data collection	Experiences in past with data and technology led staff to believe it won't be helpful to their jobs and won't help with results
<b>Long standing department directors have knowledge of program and community and should be ultimate arbitrators of how programs operate (Depts are king/queen)</b>	If Directors are “on board” with changes, then they are powerful allies.	There is an ingrained, powerful and institutionalized interest in doing things as they have been done. Potential for internal ‘turf’ fights when trying to ‘bundle services’
<b>It is worth an investment of resources toward the possibility of successfully meeting need. RISK is ok.</b>	Tradition of risk and changes in approach yield flexibility and openness (at least at higher levels) to ‘failure’	Not well developed belief at mid and lower levels of agency