



LIVING VALUES IN HIGHER EDUCATION INSTITUTIONS

PROSPECTUS

Why are values increasingly important for universities?

1. Universities today face tremendous complexity and uncertainty. This is due to the increasingly varied expectations of internal and more numerous and diverse external stakeholders, the changing dynamics of national and international politics, increased competition for students and funding, challenges arising from internationalisation, and the rapid evolution of technology and communication.
2. These challenges affect universities across the globe, regardless of their traditions, cultures, styles of operating, and missions. They impact both traditional collegial models in which academics are most influential as well as universities that are more centrally led.
3. Values have been at the heart of universities since their formation and remain an essential tool in dealing with these challenges, offering universities guidance for their conduct and decision-making. Whether it is the traditional and more fundamental values of autonomy and academic freedom, social responsibility toward their community, or other values specific to institutional missions, values are crucial to helping universities understand and identify themselves and communicate that identity and mission to stakeholders.
4. To create and maintain public trust in universities amid today's complexity and uncertainty, universities need to define their values explicitly, clearly communicate them to staff, students, and stakeholders, and demonstrate that their values inform practice and decision-making.

Why should universities engage in the Living Values project?

5. The objective of the Living Values project is to help higher education institutions identify, adopt and live by values that enable them to successfully fulfil their mission and engage with their community.
6. Reviewing and articulating values with the input of stakeholders will increase community engagement and create more trust between the institution and its staff, students, and stakeholders.
7. The Living Values guidelines will help universities and higher education institutions ensure that:
 - the values they espouse reflect the institution's mission and community;
 - staff, students, and stakeholders have been effectively engaged in defining those values; and

- all members of the institution are able to articulate and effectively live by these defined values.

Why was the Living Values project launched?

8. Based on discussions at international workshops and general agreement that mere statements on values are insufficient, the Magna Charta Observatory (MCO) created the Living Values project; a set of guidelines and resources to help universities define and live their values. These resources provide a detailed framework to help institutions to examine current positions and practices, identify or confirm what is unique about them, and modify their activities or processes as needed. The Living Values project exists to help institutions decide how to distinguish themselves and achieve their mission more fully in accordance with their values.

Who developed the Living Values project?

9. With the support of eight higher educational professionals with extensive leadership experience, ten universities in nine countries piloted the Living Values project. They are named (see the list of universities [here](#) and acknowledgments [here](#)). Engaging this diverse group has ensured that the findings reflect a broad spectrum of situations; each institution has a different mission and participants have extensive experience in higher education. This has resulted in helpful, practical guidelines and evidence that enables other universities to review, rethink, and revise their values as well as understand how effectively they are being lived and if that manifestation may be improved. Guidelines for universities can be seen at this [link](#) and a range of web-based tools and reports from the pilot universities can be accessed [here](#). These are designed to offer examples and exercises universities can use to examine their current situation as well as evidence that these methods can be effective. (Further support is available from the MCO. See [contacts](#) for details.)

Which values are included?

10. There is no universally agreed canon of values; however, universities that have signed the [Magna Charta Universitatum](#) (as well as those that have not) may wish to include the fundamental values evident at the MCO's inception some 30 years ago. These are academic freedom, institutional autonomy, and the concomitant responsibility to society. Their importance at the global level of higher education has been widely confirmed.
11. Other values underpinning institutional missions often develop over time and may include:
 - integrity and fairness;
 - equity;
 - creativity, innovativeness, and excellence;
 - social responsibility and community service;
 - diversity, pluralism, and inclusiveness, and
 - health, well-being, and a caring community.
12. In selecting values institutions are advised to be quite clear about the conceptual and practical differences between high-level (as distinct from operational) values

and how they may manifest in mission, politics, behaviours, processes, and structures. Adopting a small number of values is recommended; fewer values tend to be more memorable and thus more effective.

13. The values identified by universities that piloted the guidance can be found in their reports, accessible [here](#).

What are the benefits of reviewing institutional values and how they are lived?

14. Benefits, as well as the inevitable challenges inherent in this process, will depend on the starting point and particular circumstances of each university. Ultimately and ideally, a Living Values exercise enables a university to enhance its performance in teaching, learning, and research and strengthen its sense of community. In addition, the exercise helps to demonstrate to the outside world why the university makes certain decisions and which values it hopes to instil in its graduates.
15. More specifically, benefits identified from the pilot sites and other experience include:
 - an evaluation of current and desired values, the extent to which they are relevant and are put into practice, and how they might enhance what the university does and how it does it;
 - identifying where there might be a gap between the values espoused and their actual implementation and how they might be more effectively and beneficially implemented;
 - an externally facilitated opportunity to reflect on institutional culture and ethos as exemplified by its value system;
 - an opportunity to build and strengthen the academic community and its engagement within the university as a whole, leading to an enhanced appreciation of an institution's values and mission (if done well, this should stimulate innovation and commitment, leading to improved performance in teaching, research, and service to the community);
 - an opportunity to engage with external stakeholders, communicate the values and mission, and strengthen engagement;
 - identification and removal of barriers to the realisation of an institution's values;
 - a closer alignment of individual and institutional values;
 - enhanced social engagement and building of trust, internally with staff and students and externally with stakeholders.

The changes and benefits reported by the pilot universities can be found [here](#).

What factors can make a Living Values project successful?

16. Several factors crucial to success are fully articulated in the [guidelines](#). Key among them are:
 - the engagement of relevant stakeholders, internal and external, and their agreement on the need for, design, and execution of the initiative, which creates clear and legitimised ownership and commitment;
 - leadership from the top of the university and buy-in of leaders at various levels;
 - a bottom-up process, including a clear and agreed upon framework and two-way honest and frank communication between those leading and those contributing;
 - a well-managed process with a competent leader;
 - a limited number of critical values;

- a robust but achievable timescale;
- a well-informed process supported by accurate and relevant data;
- a goal of achieving maximum impact, with the understanding that developing and living values is a continuous, iterative, and interactive process.

How long will the process take?

17. The time needed to achieve results depends on several factors, including size, culture, structure, and complexity of the institution. Secure and sustainable outcomes will not be achieved if universities rush the process. A sufficient period of time should be allowed to enable full involvement of various stakeholders and one or more iterations between different levels and sections of the university and relevant stakeholders.
18. Key stages of the process and its implementation are described in the [guidelines](#).
19. The pilot project was undertaken over an academic year. For most pilot universities it is still work in progress, but key milestones and appreciated benefits have been achieved *en route* (see [here](#)).

How can my university engage with the Living Values project?

20. The guidelines and web-based toolkit resulting from the Living Values pilot project and elsewhere are freely available on the [MCO website](#). Each university is unique and ideally autonomous and therefore must evaluate the guidance in the context of its specific situation and proceed in a way that best fits its structure and culture and is most likely to deliver sustainable impact. There are many ways of undertaking a review of values. Details of how the pilot universities undertook their reviews can be found [here](#).
21. More detailed guidance on designing and implementing the process can be found [here](#).
22. If your university plans to apply to sign the MCU or has already signed it and wants to know how well it is living the values in practice, it may find the guidelines helpful in assessing how successfully your institution has developed and implemented values described in it and what actions enhance their achievement. (The process for applying to sign the MCU is set out on the [MCO website](#))

How can the MCO help my university use the guidance?

23. Through developing and piloting the Living Values guidance, the MCO has gained deeper insight into various ways universities can use values to strengthen their academic community and develop and achieve their mission. It has engaged a group of experienced people to work directly and on an individual basis with the pilot institutions. The resources and experience gained during the pilot are freely available to any interested institution.
24. The MCO plans to continue deepening its knowledge of values and understanding their impact at institutions worldwide by:

- a. researching and identifying how values can have tangible impact for universities;
 - b. enhancing the MCO's intelligence base and therefore its advising capacity;
 - c. enhancing the quality and range of its services to signatories;
 - d. disseminating publications, including case studies of good practice, at conferences and workshops;
 - e. further developing the tools and guidelines in light of insights gained from using them;
 - f. enabling its experienced Ambassadors to be advisers and consultants in institutional value development; and
 - g. improving understanding of situational variables.
25. The MCO plans to follow up this pilot project by organising specific dissemination workshops on the findings, possibly hosted by pilot institutions; sharing its findings at other higher education sector events; inviting universities to share their experiences through its website; and making available its Ambassadors and other experienced practitioners to assist universities wishing to use the Living Values guidance. More details can be found [here](#).
26. Furthermore, in light of its commitment to review the relevance and currency of the MCU and develop a version more fitting for a global cohort of signatories in the 21st century, the MCO will be linking the findings from the Living Values project to the review process.

How to contact the MCO

The MCO can be reached on magnacharta@unibo.it It welcomes contact from any institution interested in or currently using the Living Values guidance and tools; details of their experience or specific use of resources will continue to inform the MCO's work and assistance of other universities.