RESEARCHING VALUES: INSTRUMENTS AND INVENTORIES

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Noţiunea „valoare" este folosită în diferite ştiinţe: filosofie, psihologie, ştiinţe sociale, antropologie, ştiinţe ale educaţiei etc. Evaluarea orientărilor valorice poate avea mai multe forme. În articol se face o prezentare succintă a anchetelor pe bază de chestionar pentru determinarea sistemului de valori din perspectivă comparativă. Aceste anchete sunt recomandate pentru cercetători, manageri, profesori.

Human values are important factors for social scientists who explore social, psychological, economic, and political phenomena. Since they develop in a social context, values can be considered as a link between self and society (Rokeach, 1973), and therefore, values are a unique psychological construct that are prominent antecedents to decision-making and behavior at the individual and societal levels of analysis.

Values can be assessed through various means. One popular approach for measuring values is to survey individuals to see how they would rank or rate the relative importance of items in a given list of values. Content analysis is also an effective approach for studying human values. It provides an analysis of recorded communication such as speeches and testimonies (Fleischmann, Oard, Cheng, Wang, & Ishita, 2009).

Values have been an important socio-psychological construct in social science research. The view that values motivate and explain individual decision-making has been widely accepted and values have been acknowledged as a key predictive and explanatory factor in investigating human and social dynamics (Schwartz, 2007). Literature from psychology, sociology, organizational behavior, and political science has suggested that values may underlie and explain a variety of individual and organizational behaviors. In the field of psychology, values have been found to be related to personality types (Allport, Vernon, & Lindzey, 1960). In sociology, values have been thought to be useful for describing society's collective consciousness (Durkheim, 1960). In organizational behavior, values influence corporate decisions on strategy (England, 1967) and organizational commitment (Ponser & Schmidt, 1993). In political science, values serve as significant predictors of attitudes toward governmental policies, political parties, and institutions (Schwartz, 2007).

Researchers from various domains have aimed to analyze the structure and classification of values by proposing and developing value inventories that can be adopted in values research. Value inventories are lists of items that provide explicit categories for the analysis of human values. These inventories vary in terms of their origins, purposes, the principles of organizing values, the items of values proposed, and their applications. A value inventory not only displays what value categories are available for analysis but also provides a descriptive tool for researchers to locate their discussions of values.

Based on the above criteria, the value inventories reviewed in this study are:

1. Value Hierarchy for Management Decisions (Bernthal, 1962)

Bernthal (1962) proposed a model of a hierarchy of values for management decisions that was based on purely rational reasoning. Based on the value hierarchy he proposed, a manager should be aware of not only the economic consequences of his decision, but also the consequences in terms of different levels of values.

The model includes **four levels** of values that account for decision criteria that should be applied:

1. The business firm level: decision makers seek *profits*, *survival*, and *growth* to ensure ownership welfare.
2. The economic system level: decision makers value *allocation of resources*, *production and distribution of goods and services* to pursue consumer welfare.
3. The society level: decision makers seek "*the good life*", *culture*, *civilization*, *order*, and *justice* to preserve social welfare.
4. The individual level: decision makers emphasize on *freedom*, *opportunity*, *self-realization*, and *human dignity* to pursue individual welfare.

2. Personal Value Scale (PVS) (Scott, 1965)

The Personal Value Scale (PVS) is an instrument Scott (1965) designed for examining an individual's concept of ideal relations among people or ideal personal traits. Twelve values were identified through an open-question survey of college students by asking what traits they admire in others. A multi-question instrument was then constructed to measure the values that may be professed by students.

The PVS was used to analyze values of individual level as expressed in interpersonal relations. Each value item has short definition and followed by several example questions.

Twelve value items in the PVS are: (1) *intellectualism*, (2) *kindness*, (3) *social skills*, (4) *loyalty*, (5) *academic achievement*, (6) *physical development*, (7) *status*, (8) *honesty*, (9) *religiousness*, (10) *self-control*, (11) *creativity*, and (12) *independence*.

3. Personal Values Questionnaire (PVQ) (England, 1967)

The Personal Values Questionnaire (PVS) is an instrument England (1967) designed for use in a business context to study the value systems of business managers. It was designed from an item pool of 200 concepts selected from the literature dealing with organizations and with individual and group behavior, then the list was refined down to 66 concepts through expert judges and a pilot study of managers.

In the PVS, 66 value concepts were organized into five categories to distinguish values of individuals, organizational goals, and personal goals. However, some concepts do not in and of themselves constitute values. For example, employees, customers, and government are concepts specified as groups of people that are not value-laden.

The PVS contains the following 66 value items organized by five categories:

- Goals of business organizations: *high productivity*, *industry leadership*, *employee welfare*, *organizational stability*, *profit maximization*, *organizational efficiency*, *social welfare*, and *organizational growth*.
- Personal goals and individuals: *leisure*, *dignity*, *achievement*, *autonomy*, *money*, *individuality*, *job satisfaction*, *influence*, *security*, *power*, *creativity*, *success*, and *prestige*.
- Groups of people: *employees*, *customers*, *my co-workers*, *craftsman*, *my boss*, *managers*, *owners*, *my subordinates*, *laborers*, *my company*, *blue collar workers*, *government*, *stockholders*, *technical employees*, *me*, *labor unions*, and *white collar employees*.
- Ideas associated with people: *ambition*, *ability*, *obedience*, *trust*, *aggressiveness*, *loyalty*, *prejudice*, *compassion*, *skill*, *cooperation*, *tolerance*, *conformity*, and *honor*.
- Ideas about general topics: *authority*, *caution*, *change*, *competition*, *compromise*, *conflict*, *conservatism*, *emotions*, *equality*, *force*, *liberalism*, *property*, *rational*, *religion*, and *risk*.

4. Rokeach Value Survey (RVS) (Rokeach, 1973)

The Rokeach's Value Survey (RVS) is a value system Rokeach established for a theoretical connection between values and behavior. Through the RVS, Rokeach operationalized the conceptual definition of values and established the hierarchical organization of values. Values proposed in the RVS were selected largely on an intuitive basis after reviewing literature on values and personality traits (Rokeach, 1973). The RVS has been widely used in psychology and become the basis of other value instruments.

The RVS was constructed to distinguish between terminal and instrumental values. In the proposed value system, terminal values are ultimate goals that may be self-centered or society-centered, intrapersonal or interpersonal, while instrumental values are standards that guide conduct of behavior and consist of moral values and competence values (Rokeach, 1973).

The RVS contains the following 36 value items organized into terminal and instrumental values:

- Terminal values: *an exciting life*, *pleasure*, *mature love*, *true friendship*, *inner harmony*, *social recognition*, *a sense of accomplishment*, *family security*, *national security*, *self-respect*, *health*, *a comfortable life*, *freedom*, *salvation*, *equality*, *wisdom*, *a world at peace*, and *a world of beauty*.
- Instrumental values: *ambitious*, *broad-minded*, *capable*, *clean*, *cheerful*, *courageous*, *forgiving*, *helpful*, *honest*, *imaginative*, *independent*, *intellectual*, *logical*, *loving*, *obedient*, *polite*, *responsible*, and *self-controlled*.

5. List of Values (LOV) (Kahle, 1988)

Kahle (1988) designed the List of Values (LOV) to measure consumer attitudes and behavior. It is focused on personal values that apply to people's daily lives. The LOV contains nine values which were derived from Rokeach's list of 18 terminal values, Maslow's (1954) hierarchy of needs, and other values research literature. It has been widely used in advertising and marketing research as well as other fields.

The LOV is based on the importance of people in value fulfillment (Kahle et al., 1988). For example, values can be fulfilled through interpersonal relationships (warm relationships, sense of belonging), personal factors (self-fulfillment, being-well respected), or other needs (security, excitement, fun and enjoyment).

Nine values make up the LOV: (1) *fun and enjoyment*, (2) *warm relationships*, (3) *self-fulfillment*, (4) *being well-respected*, (5) *sense of accomplishment*, (6) *security*, (7) *self-respect*, (8) *sense of belonging*, and (9) *excitement*.

6. Comparative Emphasis Scale (CES) (Ravlin & Meglino, 1987)

The Comparative Emphasis Scale (CES) is designed to examine the impact of work values on perception and decision-making tasks. It was designed through surveys of 966 employees at different levels in a variety of organizations and the results of the surveys were sorted into separate value categorized by six independent expert judges (Ravlin & Meglino, 1987). The CES assesses individual preferences and organizational values along the same dimension, enabling examinations of congruence between individual and organization. Four work values identified in the CES are: (1) *achievement*, (2) *helping* (*concern for others*), (3) *honesty*, and (4) *fairness*.

7. Managerial Moral Standards (Bird & Waters, 1987)

Bird and Waters (1987) identified and analyze the moral standards held by managers in their work life. They first interviewed managers to discuss moral issues that have arisen in their daily work and then identified predominant features of these discussions to synthesize normative morale standards invoked by managers. These managerial moral standards have been applied to managerial ethical decisions and business ethic research.

In comparison to Bernthal's (1962) values for management decisions that distinguishes four levels of values, the managerial morale standards proposed by Bird and Waters is focused on individual level's moral standards in everyday decision-making.

The values for managerial moral standards are: (1) honesty in communication, (2) *fair treatment*, (3) *special consideration*, (4) *fair competition*, (5) *organizational responsibility*, (6) *corporate social responsibility*, and (7) *respect for law*.

8. Shared Values in Organizations (McDonald & Gandz, 1991)

McDonald and Gandz (1991) developed a comprehensive list of organizational values that can account for individual values in relation to organization needs. They first conducted 45 in-depth interviews with people from within and outside of organizations and then used content analysis to generate a pool of value items from the qualitative data. The 358 items generated form the interviews were then selected and aggregated into 24 shared values applicable to business context according to authors' judgments using root concepts from the thesaurus. McDonald and Gandz's list of values has been applied to organizational values and human resources research.

McDonald and Gandz (1991) identified a three-level classification structure linking stakeholder needs, organizational goals, and shared values. They suggested further empirical studies to examine the relationships across these three levels and indicated that individual-organizational value congruence can be assessed through the proposed list of shared values.

He shared 24 values in organizations proposed by McDonald and Gandz (1991) are: (1) *adaptability*, (2) *aggressiveness*, (3) *autonomy*, (4) *broad-mindedness*, (5) *cautiousness*, (6) *consideration*, (7) *cooperation*, (8) *courtesy*, (9) *creativity*, (10) *development*, (11) *diligence*, (12) *economy*, (13) *experimentation*, (14) *fairness*, (15) *forgiveness*, (16) *formality*, (17) *humor*, (18) *initiative*, (19) *logic*, (20) *moral integrity*, (21) *obedience*, (22) *openness*, (23) *orderliness*, and (24) *social equality*.

9. Schwartz Value Survey (SVS) (Schwartz, 1994)

The Schwartz Values Survey (SVS) is an instrument Schwartz (1994) created as a result of value surveys conducted through 20 countries as well as a thorough study of psychological value theories. The SVS specifies the dynamic relations among the motivational value types leading to a three-level hierarchy containing 56 basic human values. It provides a conceptual framework that is culturally universal in its context and structure. The SVS has both theoretical and empirical grounds and has been applied to various domains such as psychology and political science research.

The SVS was organized in a three-level hierarchy, including 4 1st-level "value dimensions," 10 2nd-level "value types," and 56 3rd-level "basic human values." These value types can be visualized in a two-dimensional space where one dimension is defined by the spectrum from conservation to openness to change and the other dimension is defined by the spectrum from self-enhancement to self-transcendence (Schwartz, 1994).

The SVS contains the following 56 basic human values categorized into 10 value types (Schwartz, 1994):
- Power: social power, authority, wealth, preserving my public image, and social recognition.
- Achievement: successful, capable, ambitious, influential, intelligent, and self-respect.
- Hedonism: pleasure, and enjoying life.

- Stimulation: daring, a varied life, and an exciting life.
- Self-direction: creativity, curious, freedom, choosing own goals, and independent.
- Universalism: protecting the environment, a world of beauty, unity with nature, broad-minded, social justice, wisdom, equality, a world at peace, and inner harmony.
- Benevolence: helpful, honest, forgiving, loyal, responsible, true friendship, a spiritual life, mature love, and meaning in life.
- Tradition: devout, accepting portion in life, humble, moderate, respect for tradition, and detachment.
- Conformity: politeness, honoring of parents and elders, obedient, and self-discipline.
- Security: clean, national security, social order, family security, reciprocation of favors, healthy, and sense of belonging.

10. Life Values Inventory (LVI) (Crace & Brown, 1995)

The Life Values Inventory (LVI) is developed by Crace and Brown (1995) to assess values that guide behavior and decision- making. It contains 14 values generated from values literature and has been validated through pilot studies and evaluated by domain experts. The LVI has been used in counseling, therapy, and team development (Brown & Crace, 2002).

The LVI explains values in decision- making process and the satisfaction that results from roles related decisions. It tries to identify the congruence between individual's values and the roles of those individuals in a society and attempts to bridge the gap between work values inventories and general values inventories (Brown & Crace, 2002).

The 14 value items in the LVI are: (1) *achievement*, (2) *belonging*, (3) *concern for the environment*, (4) *concern for others*, (5) *creativity*, (6) *financial prosperity*, (7) *health and activity*, (8) *humility*, (9) *independence*, (10) *interdependence*, (11) *objective analysis*, (12) *privacy*, (13) *responsibility*, and (14) *spirituality*.

11. The Value Framework of Workplace Spirituality (Jurkiewicz & Giacalone, 2004)

Jurkiewicz and Giacalone (2004) proposed a framework of organizational values that promote employees' experience of transcendence through the work process. The values selected in the framework are largely based on an intuitive basis culled from the theoretical work on workplace spirituality and have a positive impact on employee and organizational performance. Jurkiewicz and Giacalone (2004) argued that varying degrees of values of workplace spirituality can be recognized in an organization through its work process, policies, and practices.

The values proposed by Jurkiewicz and Giacalone (2004) are: (1) *benevolence*, (2) *generativity*, (3) *humanism*, (4) *integrity*, (5) *justice*, (6) *mutuality*, (7) *receptivity*, (8) *respect*, (9) *responsibility*, and (10) *trust.*

12. Value Sensitive Design (VSD) (Friedman et al., 2006)

Value Sensitive Design (VSD) was created by Friedman (2006) for examining human values implicated in technology design. It was derived from an integrative and iterative tripartite methodology consisting of conceptual, empirical, and technical investigations and has been applied to human-computer interaction and information science.

The VSD not only focused on the usability principles that underpinning the design of technology but also accounts for the ethical values in a principled and comprehensive manner throughout the design process. In contrast to traditional criteria of system design which is focused on usability, reliability, and correctness, the VSD emphasized the needs for human values with ethical import as a central design criterion (Friedman et al., 2006).

Key values the VSD identified for design and use of technology are: (1) *human welfare*, (2) *ownership and property*, (3) *privacy*, (4) *freedom from bias*, (5) *universal usability*, (6) *trust*, (7) *autonomy*, (8) *informed consent*, (9) *accountability*, (10) *courtesy*, (11) *identity*, (12) *calmness*, and (13) *environmental sustainability*.

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