

The Values Index (the why of human performance)

The background and history of the Values Index

WHAT IS THE VALUES INDEX

The IMX Values Index™ (VI) is the latest interpretation of the work of Drs. Eduard Spranger and Gordon Allport and their study of human value, motivation and drive. The VI is the most contemporary interpretation of these theories available on the market today. It brings with it many new and powerful features that differentiate it from other values-based instruments. Some of these refinements include: increased reliability and validity, an easier-to-use testing interface and expanded dimensions to separate two historically merged factors into unique pieces.

The VI helps people to better understand their unique value hierarchy or belief system pertaining to what motivates them, what they are most drawn to and where their passions lie. Such knowledge helps an individual become more effective in several key areas of their life, including but not limited to:

- Setting and achieving goals that are inspirational
- Creating roles that align well with motivations
- Job selection
- Performance management

Some of the most significant differentiators and improvements made to the VI tool include:

- **The Instrument Interface** – Most other values instruments require you to select a number from a drop down box to the right of each statement on the instrument (to create the order). The new click & drag instrument from IMX allows end users to actually create the list they see in their head on the screen. This creates a more intuitive and user-friendly experience that is faster and easier to use, and more accurate.
- **Return to the True Aesthetic** – Most other values instruments in the market treat Spranger's Aesthetic dimension of value as only being motivated by beauty, pretty, and/or artistic things. The VI returns this dimension to Spranger's original description of seeking form, harmony, and/or balance as well as beauty.
- **Return to the True Political & Individualistic** – Most values instruments either present Spranger's original Political, or Allport's substituted Individualistic, or worse yet actually merge the two into one dimension (combining scores). The VI remains true to original theories and presents both dimensions as stand alone providing you with a more sensitive insight into an individual's motivations.
- **Religious versus Regulatory** – Many have changed Spranger's original *Religious* dimension to the *Regulatory*, but they've kept the instrument items which ask questions about motivation through religion. Aside from the EEOC issues

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associated with asking people questions about their religious preferences in a business assessment, it skews the results. The VI has removed the religious references.

HISTORY OF VALUES

In 1914 German philosopher and psychologist Eduard Spranger published a book in German titled, *Lebensformen* (later translated into English in 1928 as, *Types of Men: the Psychology and Ethics of Personality*). In it, he described his research and observations that lead to his identifying six core attitudes or values he found present in every person. These six values were what he believed created motivation and drive in an individual, and he defined them as, “world views or filters that shape and define that which a person finds valuable, important, good or desirous.”

Values are formed through repeated experiences and multiple exposures to your world. Your experiences help determine your attitude or beliefs about what is valuable or good and what is not. The more positive the encounters associated with any dimension, the more reinforced that dimension comes as being valuable and good. Conversely, the more negative the encounters the less reinforced the dimension becomes.

Due to their connection with experiences and environment, our Values are dynamic. With enough time or experience an individual’s value hierarchy can change. It is, however, very slow to change outside of a significant emotional event or crisis. This is why it is so important that people understand their motivators and drivers since they are primarily static.

The six dimensions were:

- Aesthetic – The aesthetic person sees highest value in **form** and **harmony**.
- Economic – The economic person is characteristically interested in **what is useful**.
- Political – The political person is interested primarily in **power** and **control**.
- Social – The highest value for this type is **love of people**.
- Religious – The highest value of the religious may be called **unity**.
- Theoretical – The dominant interest of the theoretical person is the **discovery of truth**.

In the 1950’s American psychologist Gordon Allport picked up the mantle left by Spranger and became one of the first psychologists to really focus on personality in the United States. He rejected both Freud’s psychoanalytic approach to personality, which he thought went too deep, and Marston’s behavioral approach, which he thought often did not go deep enough. He placed the most importance on the uniqueness of each individual, and the importance of the present context, as opposed to past history, for understanding the personality.

Allport believed that an individual's personality is largely founded upon people's values, or basic convictions that they hold about what is and is not of real importance in life. From this assumption, he began to work off of Spranger's findings outlining six major value types.

Working from Spranger's model, Allport and his two partners created the first values instrument to allow for measuring a person's value hierarchy (the Allport Vernon Lindzey Study of Values 1956). In so doing, Allport replaced Spranger's original Political dimension with the Individualistic dimension, which he felt was more accurate. It is important to note that this was more than simply a name change. The Individualistic dimension is its own dimension, separate and discrete, from the Political dimension hypothesized by Spranger. Allport took the original Political dimension out and inserted the Individualistic dimension in its place.

In creating the IMX Values Index, we decided that both Spranger's and Allport's work - each having merit - needn't be mutually exclusive, so the decision was made to have a profile that measured both dimensions independently. As a result, the new VI profile has seven dimensions instead of six.

Along with retaining both dimensions, the new VI also replaces Spranger's original Religious with the Regulatory dimension. Unlike the substitution of Individualistic for Political, this is not a replacement, rather a name and instrument change. To comply with contemporary EEOC demands, it is not favorable to have a profile that asks specific questions about one's religious preferences, nor is it really an accurate representation of what the dimension can be about anyway.

The new VI profile uses *Regulatory* in place of the older *Religious* title and removes any mention of religious preference in the instrument itself.

With these changes, the seven dimensions of values in the IMX Values Index profile include:

- Aesthetic (Original) – A drive for balance, harmony and form.
- Altruistic (Spranger's Social) – A drive for humanitarian efforts or to help others altruistically.
- Economic (Original) – A drive for economic or practical returns.
- Individualistic (Allport's) – A drive to stand out as independent and unique.
- Political (Spranger's) – A drive to be in control or have influence.
- Regulatory (Spranger's Religious) – A drive to establish order, routine and structure.
- Theoretical (original) - A drive for knowledge, learning and understanding.

From Drs. Spranger and Allport, here are expanded definitions for each dimension:

Aesthetic: The aesthetic person sees the highest value in form and harmony. Each experience is judged from the standpoint of grace, symmetry, or fit. He regards life as a procession of events; each event enjoyed for its own sake. He need not be a creative

artist, nor need he be decadent; he is aesthetic if he but finds his chief interest in the beauty of life. The aesthetic attitude is, in a sense, diametrically opposed to the theoretical; the former is concerned with the diversity, and the latter with the understanding of experience. The aesthetic person either chooses, with Keats, to consider truth as equivalent to beauty, or agrees with Mencken, that, 'to make a thing charming is a million times more important than to make it true'. In the economic sphere the aesthetic person sees the process of manufacturing, advertising, and trade as a wholesale destruction of the values most important to him.

Altruistic: The highest value for the altruistic person is love of people. In this dimension it is the altruistic or philanthropic aspect of love that is measured. The altruistic person prizes other persons as ends, and is therefore herself kind, sympathetic, and unselfish. She is likely to find the theoretical or economic attitudes cold and inhuman. In contrast to the political type, the altruistic person regards love as itself the only suitable form of human relationship.

Economic: The economic person is characteristically interested in what is useful. Based originally upon the satisfaction of bodily needs (self-preservation), the interest in utilities develops to embrace the practical affairs of the business world—the production, marketing, and consumption of goods, the elaboration of credit, and the accumulation of tangible wealth. This type is thoroughly *practical* and conforms well to the prevailing stereotype of the businessperson.

More than perhaps any other, the economic attitude frequently comes into conflict with other values. The economic person wants education to be practical, and regards unapplied knowledge [often sought by the theoretical person] as waste. Great feats of engineering and application result from the practical demands economic people make upon science and theory. The value of utility likewise conflicts with the aesthetic value except when art serves commercial ends. In his personal life the economic person is likely to confuse luxury with beauty. In his relations with people he is more likely to be interested in surpassing them in wealth than in dominating them (political attitude) or in serving them (altruistic attitude). In some instances he may have regard for the regulatory attitudes, but inclines to consider it as a means to rewards of wealth, prosperity, and other tangible blessings.

Individualistic: The individualistic person seeks to be separate and independent. Her desire is to stand out, to express her uniqueness and be granted freedom over her actions to champion her own bearing. Unlike the political attitude, the individualistic person seeks neither power nor control of others or the environment in general. She is only concerned with controlling her own fate and protecting her own sovereignty. The individual person rails against his subjugation by any external force and when she feels so her only focus becomes her own emancipation.

Political: The political person is interested primarily in power and control. His activities are not necessarily within the narrow field of politics, but whatever his vocation, he

betrays himself as a *Machtmensch* (i.e., control freak.) Leaders in any field generally have high power and control values. Since competition and struggle play a large part in all life, many philosophers have seen power as the most universal and most fundamental of motives. There are, however, certain personalities in whom the desire for a direct expression of this motive is uppermost, who wish above all else for personal power, influence, and renown.

Regulatory: The highest value of the regulatory person may be called unity. She is mystical and seeks to comprehend the cosmos as a whole and to relate herself to its embracing totality. The regulatory person is one whose mental attitude is directed towards achieving structure and is permanently directed to the creation of the highest and absolutely satisfying value of order and constitution. Some of this type finds their life's value in the affirmation of life's systems or processes and in active participation therein. The 'traditionalist' seeks to unite herself with a higher order – to be one with the system.

Theoretical: The dominant interest of the theoretical person is the discovery of truth. In the pursuit of this goal he characteristically takes a 'cognitive' attitude, one that looks for identities and differences; one that divests itself of judgments regarding the beauty or utility of objects, and seeks only to observe, reason and understand. Since the interests of the theoretical are empirical, critical, and rational, he is necessarily an intellectualist, frequently a scientist or philosopher. His chief aim in life is to gain, order and systematize his knowledge.

Now for a more practical set of definitions for each dimension:

Aesthetic
<p>The main motivation in this value is the drive to achieve balance, harmony and find form or beauty. Environmental concerns or “green” initiatives are also typically prized by this dimension.</p>
<ul style="list-style-type: none">• Artistic expression• Harmony• Form over function• Balance• Mutual respect• Creativity• Self-fulfillment• Subjectivity• Beauty

Altruistic
<p>This drive is an expression of the need or drive to benefit others in a humanitarian sense. There is a genuine sincerity in this dimension to help others, give of one’s time, resources and energy, in aid of others.</p>
<ul style="list-style-type: none">• Giving of self• Support of others• People orientation• Helping• Improving society• Generosity• Selflessness• Compassion• Caring

Political
<p>This drive is to be seen as a leader, and to have influence and control over one’s environment or success. Competitiveness is often associated with those scoring high in this motivation.</p>
<ul style="list-style-type: none">• Power• Control• Influential• Governing• Leadership• Authoritative• Competitive• Status and esteem• Accountable

Regulatory
<p>The Regulatory drive indicates one’s drive to establish order, routine and structure. This motivation is to promote rules and policies, a traditional approach and security through standards and protocols.</p>
<ul style="list-style-type: none">• Systemic• Governed• Orderly• Traditional• Regulated• Principled• Structured• Focused

Economic

This dimension examines the motivation for security from economic gain, and to achieve practical returns. The preferred approach of this dimension is a professional one with a focus on bottom-line results.

- Practical returns
- Monetary interests
- Efficiency
- Utility
- Production
- Capitalism
- Maximizing gains
- Results

Individualistic

The Individualistic dimensions deals with one's need to be seen as unique, independent, and to stand apart from the crowd. This is the drive to be socially independent and have opportunity for freedom of personal expression.

- Unique
- Independent
- Special
- Autonomous
- Free
- Relevant
- Sovereign
- Self-governed

Theoretical

The drive to understand, gain knowledge, or discover the "truth". This motivation can often be to gain knowledge for knowledge sake. Rational thinking, reasoning and problem solving are important to this dimension.

- Rational
- Objective
- Fact-based
- Discovering the truth
- Learning
- Solving problems
- Intellectual power
- Analyzing
- Clarifying

Nature Versus Nurture

Spranger championed Nature (genetics) as having the greatest influence on our value hierarchy. He wrote, “Become what you are”, which could be interpreted to mean, “Become aware of what motivates you, what you value, what inspires you – and be true to it.” Allport, on the other hand, championed Nurture (Socioeconomic influences of childhood) as being of greater influence on our value system.

Most modern researchers today favor something in the middle – a mix of nature and nurture that finds a genetic predisposition to certain traits, tendencies, talents, and abilities, but these must be activated through exposure to certain environmental conditions. It’s like having a genetic predisposition to diabetes, but not everyone with those genetic markers contracts the disease. It takes exposure to certain conditions like poor diet, obesity, or illness to bring the diabetes on.

So, while our values definitely change and grow – they do so over the course of our lives, not rapidly over a weekend. In other words, they are pretty much *fixed* for longer periods of time. This means it’s important to understand them, so they can be optimally aligned with what, or more accurately, *why* we do the things we do.

If I’m predominantly motivated by altruism, yet my job motivates me most significantly by economic means, I won’t find nearly as much passion and reward in what I do. Understanding what drives you, what motivates you, what inspires and is deemed important by you is a vital first step in improving performance, satisfaction, and happiness in any person’s life.

The applications for a Vale Science and profile

USES FOR THE VALUES INDEX PROFILE

Interpersonal & Intrapersonal Communication: The VI profile provides a helpful tool that can allow two people to understand what aspects of a situation or environment they both appreciate similarly. Understanding what draws two or more people to a thing can help identify more people who would be likewise inspired, and it helps create synergy and camaraderie. Understanding your own attraction to certain activities or causes can be equally as important when it comes to divining the important in what you do and why you do it. In other words, knowing why you will get out of bed tomorrow morning is not a minor thing.

Role Building and Goal Setting and Achievement: When setting goals for yourself, or others, it helps to know why they would want to achieve the goal in the first place. What is it that the goal addresses that is important to them, or you? Setting a goal that provides monetary rewards to someone with the altruistic dimension as his highest will not likely deliver the anticipated motivation or inspire superior performance. Similarly,

incentivizing a high economic with promises of new relationships and improving society (assuming there is no obvious economic return) will not be a good way to motivate the person. Being aware of and understanding a person's natural motivation style helps ensure that goals are resonating with them maximally.

Job Selection: Much like creating an ideal role, placing a person in an ideal existing role requires the same level of awareness for four aspects of the role:

- What the job requires
- What the job provides
- What the person requires
- What the person provides

When you understand all four sides of this equation, you can make more informed decisions about who would be the best fit in which role. Understanding a person's motivations and drivers is one significant component in filling this need.

The statistical and validity evidence supporting psychometric quality of the Values Index

The reliability study of the IMX Values Index utilized a sample of 1983 individual profiles. These data were made up from 58% males and 42% females and accurately represent the diverse range of those who utilize this instrument. Respondents' age ranged from 20s through over 55 years of age. Occupations include leadership, management, customer service, manufacturing, banking clerk, accounting, attorney, education, entrepreneurs and postal workers. Thus, the sample represents a full range of individuals making use of the instrument in a variety of settings.

The IMX Values Index contains ten sets of seven phrases each. Each phrase is a proxy statement representing one of the seven dimensions of value as defined by Dr's Spranger or Allport. Respondents rank order the seven items from 1=Most like me, to 7=Least like me.

Scales are constructed by first reversing the values, then summing up all related item ranks, and finally adjusting the score upward to avoid zeros.

The scales are Aesthetic, Economic, Individualistic, Political, Altruistic, Regulatory and Theoretical.

Scale reliabilities were calculated using Cronbach's Alpha (α), which is considered to be the most appropriate statistical test for reliability given the ranking of responses used to construct the scales. This statistic models internal consistency, based on the average inter-item correlation, is a more rigorous test than a traditional split-half statistic. Cronbach's α is bounded from 0 to 1. In general an α equal to or greater than .6 is considered a minimum acceptable level, although some authorities argue for a stronger standard of at least .7.

Values Index

Aesthetic	0.84
Economic	0.81
Individualistic	0.83
Political	0.79
Altruistic	0.81
Regulatory	0.79
Theoretical	0.83

Scale Correlations

Ideally, instrument scales should measure independent characteristics, which are indicated by non-significant and minimal positive correlations. Examinations of the relationship among the IMX Values Index scales show only non-significant positive correlations and weak to moderate negative correlations, indicating an acceptable level of independence among the scales.

Spearman Rank Order Correlations Among Scales

		AES	ECO	IND	POL	ALT	REG	THE
AES	Correlation Coefficient	1.000						
	Significance (2-tailed)	0.000						
ECO	Correlation Coefficient	-0.468	1.000					
	Significance (2-tailed)	0.001	0.000					
IND	Correlation Coefficient	-0.032	-0.282	1.000				
	Significance (2-tailed)	0.002	0.000	0.000				
POL	Correlation Coefficient	-0.218	-0.348	0.368	1.000			
	Significance (2-tailed)	0.000	0.000	0.000	0.000			
ALT	Correlation Coefficient	0.469	0.082	-0.164	-0.279	1.000		
	Significance (2-tailed)	0.000	0.002	0.001	0.000	0.000		
REG	Correlation Coefficient	0.248	0.363	-0.368	-0.256	0.082	1.000	
	Significance (2-tailed)	0.276	0.000	0.000	0.000	0.004	0.000	
THE	Correlation Coefficient	-0.098	-0.257	0.367	-0.409	-0.379	-0.323	1.000
	Significance (2-tailed)	0.193	0.000	0.000	0.000	0.004	0.000	

Values Index instrument protocols and utilization

STEPS OF VALUES INDEX INTERPRETATION

Unlike the behavioral dimension in the DI profile, the dimensions of Value in the VI do not mix or create patterns. Each is treated as a stand alone item. Yes, you do want to look at how they all play together, and which are the most and least motivational, but they do not merge to create a style in the way behaviors do. This makes the VI profile much easier to interpret and use for the end user and yourself.

The easiest way to debrief the report is to simply follow the layout of the report and work through the report from front to back cover. The layout and design of the report have been carefully crafted to support you in providing the best interpretation possible. Each page describes the type of information it contains as well as how it is useful. In doing so, there are a few things you should look for in each section.

- **Pages 1 – 4:** These are static educational pages that don't change from report to report based on the respondent's scores.
 - Key Objectives:
 - Educate them on the background theories of Values and the benefits of the Values Index profile.
 - Introduce them to the seven dimensions of value.
- **Pages 5:** this is a key page as it contains all seven dimensions along with their independent levels in each and comparative levels relative to the norms. The graphs on these pages are unique to the end user and reflect the users scores in each, the norm for each and a word descriptor for each that varies depending on the users level in each value dimension.
 - Key Objectives:
 - Review their levels for each dimension (descriptive words and sentences).
 - Identify their two highest value dimensions and *Merge* them
 - Identify their two lowest value dimensions.
 - Identify the three remaining value dimensions.

(Use the Merged Statements on page 32 of this manual to illustrate the meaning of their merged dimensions.)
- **Pages 6 – 19:** These pages contain five categories that repeat for each of the seven value dimensions. Review each page, starting with the highest two dimensions and working down. Those five categories are:
 - General Traits – typical characteristics or preferences associated with this dimension.
 - Key Strengths – top strengths associate with this dimension.
 - Motivational Insights – key things to keep in mind to achieve optimal motivation and drive.
 - Training/Learning insights – specific characteristics that affect gathering and sharing of knowledge or information.
 - Continual Improvements – ideas where the individual might benefit through self-awareness and authenticity.
 - Key Objectives:
 - Explore each bullet.
 - Qualify as pertaining to them or not.
 - Quantify how well that item is being satisfied or leveraged.
- **Relevance Pages:** The relevance pages are designed to help you connect the information in the report to the end users specific life. By asking targeted questions about each dimension, it provides you with a simple-to-follow list of questions you can use to spark healthy discussions about what behavior means to the respondent.

- **Success Connection Page:** These pages are designed to help you have discussions around how the overall combination of their value dimensions either supports or limits personal success.

Merging the top two values: One way to help the participant's better understand their top two values is to help them merge the two into a single, cohesive message. This starts by making sure they fully understand those two dimensions, and using the expanded definitions from the previous section (pages 25 – 29) will help them do that.

To take it one step further, use the combination statements below to help them create an image in their head of how the two merge. Below you will find the twenty-one merged statements that result from combining all seven dimensions. Once you have identified the participant's top two, select that combination from the list below and add its information to your interpretation.

1. **Aesthetic - Altruistic:** A person who believes in eliminating social ill in order to achieve greater social health and harmony. Helping others find beauty, harmony, and balance in their life. Peace and harmony for all. (The Peace Giver)
2. **Aesthetic – Economical:** Someone who believes that achieving harmony, form, and balance delivers the highest returns. The most practical use of resources is one that is sustainable and non-detrimental to the source. (The Practical Conservationist)
3. **Aesthetic – Individualistic:** A person driven to achieve balance and harmony in his/her own unique way. "I create my own definition of beauty." Prefers to be free to do things that bring beauty and balance to his/her life. (The Independent Artist)
4. **Aesthetic – Political:** Someone who likes to lead others in the pursuit of higher forms of beauty and harmony in life, and that the finer things can improve position, status, or influence. (The Aesthetic Leader)
5. **Aesthetic – Regulatory:** Someone who values beauty, form, and function, but feels there are traditional definitions or means that should be respected and followed. There are accepted norms for what is beautiful, "Beauty is in the eye of the populous." (The Traditional Artist)
6. **Aesthetic – Theoretical:** Someone who seeks to more fully understand what is beautiful and good, and to clarify, define, and classify it. (The Art Expert)
7. **Altruistic – Economical:** Believes that well supported people make for the most productive people; you must give in order to receive. There is giving, but with the expectation of some return. (The Social Investor)

8. **Altruistic – Individualistic:** Thinks, “When I give to others, I am benefited; I like to help others in my own unique way.” (The Freelance Humanitarian)
9. **Altruistic – Political:** Believes in leading others in a worthy cause or mission; prefer to be in charge of social aid programs or benefit. (The Humanitarian Leader)
10. **Altruistic – Regulatory:** Someone who thinks it important to create policies and regulations that govern social aid; social aid should be orderly and structured. (The Social Worker)
11. **Altruistic – Theoretical:** A person who prefers to use knowledge to help others; teaching others to fish. (The Mentor)
12. **Economic – Individualistic:** Someone who views himself as the commodity or brand; he is his own best investment; celebrity. (The Star)
13. **Economic – Political:** Believes that being in charge ensures the best results; leading the pursuit of profits. (The CEO)
14. **Economic – Regulatory:** A person who feels that the best results come from having a plan and sticking to it; careful planning and structured processes ensure optimal results. (The Manager)
15. **Economic – Theoretical:** Someone who believes that, “Knowledge is valuable in a monetary sense”; learning and understanding are the best investment there is; quoting Ben Franklin, “An investment in knowledge always pays the best interest.” (The Consultant)
16. **Individualistic – Political:** Being in charge ensures that I get to do things my way; believes in being his own boss. (The Entrepreneur)
17. **Individualistic – Regulatory:** Believes that there is a *right* way to do everything, and their way is that right way; thinks it important to follow rules and regulations but typically their version. (The Different Drummer)
18. **Individualistic – Theoretical:** “The more I know, the more I stand apart from the rest”; someone who seeks to possess a rare level of expertise or skill. (The Specialist)
19. **Political – Regulatory:** A person who will lead others in advancing a common cause or mission; prefers to be in charge of compliance to keep order and create regulations. (The Judge)
20. **Political – Theoretical:** Believes that knowledge is power; sees the acquisition of knowledge and understanding as the key to control and influence. (The Authority)

21. Regulatory – Theoretical: Seeks to identify, understand, and analyze the best way to do things so the right policies and systems can be put into place. (The Quality Assurance Person)

Quantity/Quality of the Scores: There are certain times when you want to know not only which two dimensions are the highest, but how strong they are. To understand the degree of their passion or motivation, it helps to compare their score against the norm for the rest of the population. To do this you use the norms that appear on page 5. Compared to those norms, an individual can be either:

- Negative motivation (to be avoided) = more than one standard deviation below the norm.
- Mainstream motivation = within one standard deviation above or below the norm.
- Passionate motivation = more than one standard deviation above the norm.

Understanding people's specific level of motivation for any given dimension can be crucial to helping them understand what power it has in their life and how that can benefit them or not. For example; knowing that someone has extreme motivation for the altruistic dimension, but only mainstream levels of motivation for the economic – would help explain why they keep giving away their valuable expertise or products.

The highest two dimensions are the most inspirational. These are the ones that should be focused on making a connection to their work and life. The middle three are situational and may become somewhat motivation at certain times, or in certain circumstances, but for the most part they apply the average amount of motivation and passion as would be seen in most people. The lowest two dimensions are actually more important than the middle three because these can become de-motivational (actually eroding passion and drive). It is important to understand these to make very sure that the person is not being motivated by either of these two means. If present in the environment, the bottom two could actually represent something that is de-motivating an individual.