



# **Values-based Indicator of Motivation (VbIM)**

## **User's Guide**



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**(VbIM)  
User's Guide 1.0**

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# Introduction.

“Musicians must make music, artists must paint, poets must write if they are to be ultimately at peace with themselves. What human beings can be, they must be. They must be true to their own nature. This need we may call self-actualization... It refers to man’s desire for self-fulfilment, namely to the tendency for him to become actually in what he is potentially: to become everything one is capable of becoming.”

Abraham Maslow from *Motivation and Personality*

“Everyone has his own specific vocation or mission in life; everyone must carry out a concrete assignment that demands fulfilment. Therein he cannot be replaced, nor can his life be repeated, thus, everyone's task is unique as his specific opportunity.”

“Those who have a 'why' to live, can bear with almost any 'how.'”

Victor Frankl

A friend of mine woke up in the middle of the night with a sense of unease. He then drove fifty miles to make sure that his mother was OK – and he still went to work that day. Why? Another friend works for very little pay and yet is willing to work very long hours without complaining – usually. Why? Someone I met many years ago whilst working as a Community Service Supervisor was known to his gang as “The General.” He would put in hours of preparation to get his supporters in the right place at the right time to fight with rival gangs. Why? The Values-based Indicator of Motivation tries to shine a light on many such issues. At its heart it addresses the basic question “Why do we get out of bed in the morning?”

Many questionnaires have been developed to measure people and their personality. However, we do not understand the situations described above any better when we are told that a person is inclined to be more extraverted than introverted. We may be tempted to believe that the person described above who drove fifty miles had an anxious personality – but in fact he had a particularly calm temperament! Personality tells us more about HOW someone will go about doing something than WHY they do it. If we really want to understand others we need to explore their fundamental motives and values.

Values are the key to understanding people’s energy and motivation. Explore people’s values and you can unlock the “what, where, when and why” of people’s actions. However, this area is remarkably uncharted. When we began exploring this area, many of the models and questionnaires appeared locked in a time-warp. Fundamental values such as tradition and security, whilst important, reflect the pre-occupations of people living through the turbulence of the 20<sup>th</sup> century. Our own investigations about what mattered most to people today indicated a far greater emphasis on relational and spiritual values. These are poorly represented in mainstream questionnaires which appear locked into psychological models that are themselves rooted in the past..

VbIM has therefore been developed to provide a more up-to-date and detailed map of values and motivations that reflects what is important in the 21<sup>st</sup> Century. Our purpose was to provide a tool that would enable us to discover things like what drives people at work and outside to commit time and energy beyond the absolute minimum. In the work context one thing is certain – motivation does not come solely from financial reward. Twenty years ago Tom Peter's highly influential book, *In Search of Excellence*, drew attention to the importance of a range of values in the workplace...etc. These days we need to recognise an even broader range and VbIM was developed to map out this relatively uncharted terrain.

### **Why was VbIM developed?**

All that matters requires energy. Finding, releasing and channelling energy is arguably the biggest challenge we face. This is certainly true for employers and managers. It is also for all those who deal with others – parents, teachers, social workers to name but a few. However, values are also fundamentally important for our own personal life and goals. They provide meaning and satisfaction. They influence the intensity and flow of our psychological energy. They guide us; direct us; enable us to take the next step; provide the criteria for guiding our actions; and much more. They provide the fuel that drives the car and the pipes that direct the flow. Talent without energy is unrealised potential that needs igniting. Energy without talent is dangerous and needs harnessing and redirecting in new and more fruitful directions.

Given how important this area is, it is surprising that there is such a paucity of tools to help navigate this terrain. VbIM has been developed to provide a new and comprehensive framework of values assessed in a fresh way. It has incorporated the best of the models developed last century where the concerns of the times involved greater emphasis on tradition, security, excitement etc. It has embedded these within the wider range of issues that are fundamentally important to people today – relationships, ideas, spirituality etc. It may well be that these have always been important and so we hope that VbIM provides a much needed detailed and comprehensive map for the new territory.

### **What does the PfS Values Based indicator of Motivation offer?**

- **Up-to-date and comprehensive** – the model identifies 24 possible motives and values thus filling the gaps left by other questionnaires.
- **Simplicity with complexity** – by structuring the scales into 4 key areas the interpretation and feedback can be made more understandable and impactful.
- **The potential for surprising insight** – by combining both normative and ipsative approaches, it allows not only comparisons with different norm groups but also a challenge to the person's consciously expressed views (by highlighting potential inconsistencies in the responses made).
- **A common language** – for describing a person's identity and for enabling people who live or work together to appreciate their similarities and differences.
- **Ease of use** – available online and accessible anywhere anytime.
- **Speeds of interpretation** – the comprehensive reports are available by e-mail to either the respondent or the facilitator, or both.





# Section One: The Concept of Values

## Background

To begin, it should be appreciated that an understanding of human values and the development of 'systems' of values is nothing new. In Confucian, Buddhist, Sikh and Christian philosophies, to name but a few, it is possible to identify lists of values, or virtues, which are designed to guide behaviour. Indeed famously the work of the great renaissance artist, Giotto, depicts the seven classical virtues: prudence, fortitude, temperance, justice, faith, charity and hope. Moving forward we find these same themes appearing in contemporary models of values, and in the emerging field of 'strengths' psychology with the re-discovery of themes like justice and temperance (Linley & Harrington, 2006).

But what is a value? Arguably it was not until the 1970's that a truly scientific framework for looking at values emerged, and the central figure was Milton Rokeach. He stated that values are a belief that 'a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence' (Rokeach 1973). What this means is that values have a subjective component and include a judgement about what is or is not important and what is or is not an acceptable way of behaving. Statements such as 'people should be free to act as they like as long as they do not break the law' or 'it is important that we can all develop to our full potential' are thus markers to core values, in this case the valuing of 'accountability' and 'personal growth' respectively.

In addition, as Rokeach reflected, values are probably learnt early in life through socialisation and interactions with parents, teachers, friends and peers (Rokeach 1973; Feather 1985). Some researchers also claim that, as with other psychological attributes, there is an inherited component (Meglino & Ravlin, 1998).

Bringing all of this together, a clearer definition of a value might be that it is:

*'a guiding and motivating principle in which we have an emotional or cognitive investment, that we find it important and preferable to adopt for personal, social or cultural reasons'.*

Values then can be thought of as the elements of our identity that give meaning, mission and purpose to our lives – they also energise and motivate us to do things. However what is obvious from the new definition is that we need to attend to the concept of 'importance'. In particular as Robbins & Coulter (2004) point out, there is a difference between the nature of a value, which determines whether it features in our view of the world, and its intensity, which influences *how* important we feel it is. Obviously if we were to put these two things together it would be possible to construct a hierarchy of values for a person, but one in which the order of the values might change as a result of circumstances. The last point is an important one because it suggests that values may be ordered by their importance *relative* to other values. So while a person's values *per se* may be relatively fixed, different values may be more or less important at different times. This point has been ably made by Shalom Schwartz (1987, 1992), another key figure in this area, and the author of one of the most influential values questionnaires, the Schwartz Value Survey.

In a similar vein it is useful to make a distinction between so-called 'espoused' values and those that are 'in-use'. The crux of a useful distinction made by Argyris & Schon (1978) in their book on organisational learning, and by Schein (2004), which points to the difference between paying lip-service to organisational values – or those values that a person wants other people to think they hold – and the in-use values that actually drive their behaviour. Of course this dichotomy is important because it is useful to know what sort of values are influencing a person's decision making. The match between personal (in-use) values, and espoused or actual organisational values, can also have a profound effect on someone's motivation. So for example if an employee believes that their values are in line with those of the organisation in which they work they are likely to be more content and productive (Feather & Rauter, 2004).

## Historical typologies

In psychology there have been many influences on values research and the typologies that have been produced to describe and map them. For example most values typologies draw on the early work on psychological needs, and concepts such as **self-actualisation** (Maslow 1954; Herzberg 1959). Many will be familiar with Maslow's concept of the 'hierarchy of needs', an ordering of needs from those that are physiological (eg: hunger) through to self-actualisation (the need to fulfil one's potential); and Herzberg's work on what affects people's attitude to work. The latter including 'hygiene' factors such as working conditions and salary, as opposed to motivational factors like achievement, recognition and advancement. Readers may also be familiar with the terms '**extrinsic**' and '**intrinsic**' motivation. And as with Herzberg's factors these refer to external (extrinsic) motivators like salary – or the valuing of money or material reward, versus internal (intrinsic) motivators such as the valuing of being part of a group or team.

Another strand of influence comes from theories concerned with quality of working life and level of aspiration (Lawler 1982), and the effect that '**well-being**' can have on productivity and GNP (Worrall and Cooper, 2006). A low level of 'well-being' being variously estimated as costing 5-10% of GNP per annum. Thus one can see that health and wellbeing may well be important values, although interestingly they are not often found in values questionnaires.

There is also a great body of work relating to **achievement**. This is built on the seminal work of Murray (1938) who produced an extensive model of needs and motivational processes, aspects of which were popularised by McClelland (1961) in his book on the 'Achieving Society'. Indeed many values systems now include his three needs: **need for achievement**, **need for affiliation**, and **need for power**. And these needs can equally be expressed as **values**: the valuing of achievement or advancement, the valuing of affiliation or connection, and the valuing of power or influence.

More generally there are links between motivation, values and interests research through people like Schein (1993) and his notion of **career anchors**. These include values such as autonomy/independence, security/stability and service/dedication. Indeed Schein (1996) defines the concept of the career anchor as 'a person's self-concept, consisting of talents and abilities, basic values and, most important, the evolved sense of motives and needs as they pertain to the career.' Other researchers such as Hogan (1996) also make an explicit association between values and career interests, and there is evidence that personality can be drawn into the picture as well. Furnham (1984), for example, has demonstrated a clear relationship between introversion and freedom and self-respect, and neuroticism and harmony.

Finally there is a **cross-cultural dimension** to values measurement which is perhaps best characterised by the contribution of Geert Hofstede (2001), his work over many years having identified five common dimensions that can be used to understand differences in national cultural values. For instance, he has highlighted the importance of looking at '**individualism**' or the strength of the ties that people have to others in their community; and the importance of **power/distance**, or the degree to which inequality exists and is accepted by people with and without power. The remaining three dimensions are **masculinity** (the degree to which a society adheres to traditional male and female roles, **uncertainty/avoidance** (the way in which society treats ambiguity, or conversely, seeks rules and order) and **long term orientation** (the degree to which a society values long-standing as opposed to short-term traditions and values).

Over the years much of the research described has been combined to produce **psychometric measures** of individual and/or cultural values. The Schwartz Value Survey – SVS (Littrell & Schwartz, 2007) had already been mentioned, but there are others, notably the Rokeach Value Survey – RVS (Rokeach 1973), Allport-Vernon-Lindzey Scale - AVLS (Allport et al, 1960), Super's Work Values Inventory – SWVI (Super 1964, Zytowski 2006), the revised versions of Gordon's Surveys of Personal and Interpersonal Values – GSPV, GSIV (Gordon 1992, 1993), Schein Careers Anchors Questionnaire – SCAQ (Schein 1993), Hogan Motives, Values and Preferences Inventory – HMVPI (Hogan & Hogan, 1996), and to tie in with Hofstede's cultural dimensions, the Hofstede Value Survey – HVS (Hofstede 1994). There have also been a **small number of other values/motivation** questionnaires produced by the major UK psychometric test publishers.

What all of these questionnaires have in common is that they tend to map onto a set of values that reflect the spirit of the time. Thus whilst the SVS and its associated values 'Circumplex' (model) covers 11 value domains, including a recently added '**spirituality**', it **misses** some of the more **relationally orientated** (eg: inclusion, trust) and 'ego' centred (eg: desire for fame, legacy) values. By comparison the RVS measures 18 terminal and 18 instrumental values. The former are 'desirable end-states of existence' such as salvation, peace of mind and friendship; and the latter, 'desirable modes of conduct' such as being ambitious, honest and loving. However whilst the RVS has been important in values research, it was not specifically designed to measure work values.

The **AVLS** was designed to measure basic interests and motives but covers only six areas - theoretical, economic, aesthetic, social, political and religious; and in a similar vein the GSPV, GSIV, SCAQ and HVS all measure between five and eight values, which whilst of some interest at the individual level, tend to lack sufficient depth to be used for anything other than general development purposes. Indeed the HVS is designed as a cross-cultural survey tool rather than a person-centred questionnaire.

The **two exceptions** are the revised version of the SWVI and the HVMPI. These provide broader coverage than the other questionnaires, although it should be noted that the SWVI is still based on a 1960's view of values, and the HVMPI has its roots in the psychology of values *and* interests. Thus like some of the other earlier questionnaires, values such as affiliation and recognition sit alongside interests like commercial and scientific.

What is also the case is that the questionnaires available on the market tend to look back to a time when the important distinction was thought to be between **extrinsic and intrinsic factors**, and again they tend to **overlook or minimise** the importance of more contemporary issues such as the value that many place on relationships and relationship building.

## **The VbIM Model**

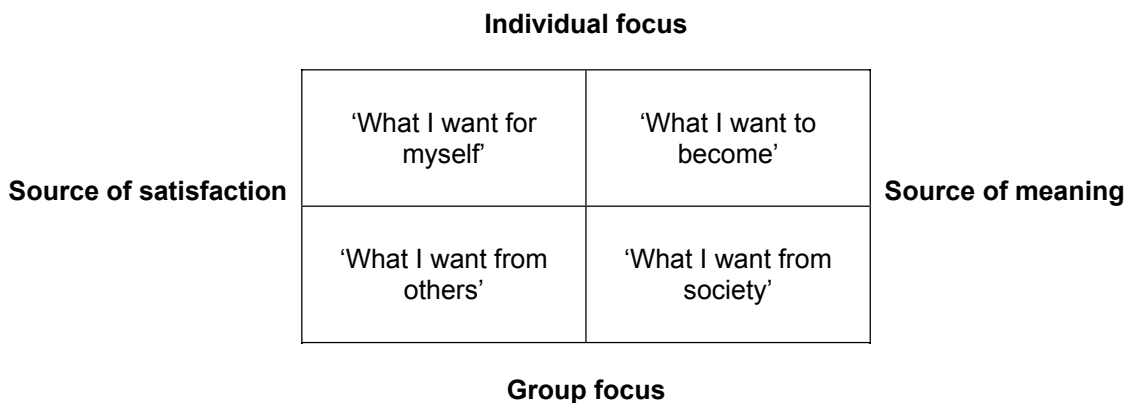
The VbIM model sits on the shoulders of existing research and is also based on an analysis of the breadth of coverage provided by current questionnaires. It has been developed to provide a comprehensive map of values and motivations, and to reflect what is important to individuals in the 21<sup>st</sup> Century. That is not to say that it does not include core values such as **tradition** and **security**, rather it **adds important new values**. It also brings back in **character 'strengths'** – the old virtues – through the explicit inclusion of concepts like integrity and transcendence. Additionally it reflects advances in evolutionary psychology, and for example the four basic 'drives' that appear to be hardwired into the human brain: **Acquire** (essential resources as well as psychological 'assets' that improve social status); **Bond** (to develop relationships with individuals and groups as a way of improving security and excitement); **Learn** (to acquire beliefs that make the world more predictable); and **Defend** (to protect against threats to ourselves, our values and relationships) – Laurence & Nohria, 2002.

The process of considering and testing values took place over five years and included the production of various prototype questionnaires. These included varying numbers of values and were based on three different rational or factorial models. However at the end of the process **24 values were identified** and are included in the current version of the VbIM questionnaire

For example a review of existing questionnaires illustrates the fact that there are **many ways of organising and structuring values**. Thus it is possible to look specifically at work-based values, and then at personal values, to see how these interact and affect motivation. Likewise the emphasis can be on values that are rooted in the past (stability), or the future (change), and of course on self-enhancement versus a concern for others. This last approach is the one used in the SVS.

However there is an even more fundamental way of considering values. This is to make a distinction between those that are essentially **individual (personal)** or **group focussed (interpersonal)**, and those that are concerned with sources of satisfaction or sources of **meaning**. Values that lead to satisfaction are generally those that are more 'visible' in a work or social context, like material reward or excitement. In contrast, those that encompass meaning are more often to do with personal growth or mastery. Meaning is also derived from values that are related to the 'common good', such as altruism, or with independence and individual expression such as libertarianism. It is in this way that the VbIM model encapsulates the difference between the individual and the group, and between sources of satisfaction and sources of meaning.

The model allows the 24 values to be placed into four groups\*:



Combining the values and the groups produces a map of values which is presented in Table I, overleaf. It should also be noted that more information on the construction of the questionnaire can be found in the next section

\*See Appendix 1 for VbIM Summary Profile Sheet



**Table I : VbIM Rational Model**

Group	Scale name	Definition	Key concept
<b>What I want for myself</b> (Individual satisfaction)	Reward	Materialistic v Non-materialistic. Seeks wealth and the symbols of success.	Reward
	Fame	Visibility v Anonymity. Seeks 'visibility' and wants to be in the public eye.	Visibility
	Wellbeing	Health v Indulgence. Seeks health and mental wellbeing.	Wellbeing
	Excitement	Immediacy v Delay. Seeks fun, pleasure, spontaneity and immediate reward.	Spontaneity
	Change	Risk v Security. Seeks change and progress and willing to take risks.	Risk
	Conceptual	Ideas v Actions. Seeks the opportunity to make an intellectual/creative difference.	Intellectual
<b>What I want to become</b> (Individual meaning)	Personal growth	Learning v Consolidating. Values personal development, growth & being up-to-date.	Development
	Career progression	Ambition v Acceptance. Values careers orientation and is ambitious to achieve.	Ambition
	Influence	Power v Accommodation. Values leading, influencing and providing direction.	Directing
	Legacy	Impact v Passivity. Values prestige or meaningful recognition for work well done.	Impact
	Wisdom	Humility v Pride. Values experience bringing new perspective with acceptance & humility.	Forgiveness
	Transcendence	Spiritual v Physical. Values non-material and spiritual things.	Spirituality
<b>What I want from others</b> (Group satisfaction)	Social contact	Contact v Independence. Seeks the company and support of others.	Affiliation
	Integrity	Principles v Expediency. Seeks fair, honest and authentic interactions based on principles.	Principles
	Connection	Intimacy v Distance. Seeks to share emotional life and values in close 1-2-1 relationships.	Sharing
	Openness	Discourse v Privacy. Seeks to develop trust through openness and honesty.	Authenticity
	Collaboration	Consensus v Direction. Seeks participation based on agreement & joint decision making.	Consensus
	Inclusion	Belonging v Moving on. Seeks to join, be included, grow roots and build community.	Belonging
<b>What I want from society</b> (Group meaning)	Altruism	Communitarian v Individualism. Values a caring, relational and 'giving' society.	Selfless
	Tradition	Continuity v Break with past. Values the contribution, sacrifice & rituals of the past.	Continuity
	Culture	Aesthetics v Functionality. Values cultural expression in diverse forms	Aesthetics
	Harmony	Tolerance v Challenge. Values group cohesion and avoids conflict.	Tolerance
	Libertarian	Freedom v Conformity. Values free will and the rights of people to express themselves	Freedom
	Accountability	Responsibilities v Rights. Values a society where people are responsible for their choices.	Ownership

**Table II : A Comparison of various Values Systems**

VbIM	SVS	HMVPI	SCAQ	WIS	GSPV/SIV	SWVI	AVLS
Reward		Commercial		Comfort - money		Income	Economic
Fame							
Wellbeing				Comfort - stress avoidance			
Excitement	Hedonism, Stimulation	Hedonistic			Variety	Lifestyle	
Change	Security	Security	Security, tradition	Job structure - risk avoidance	Orderliness	Security	
Conceptual		Scientific	Entrepreneurial, creative			Creativity, variety	Theoretical
Personal growth	Self-direction		Autonomy, independence	Self-fulfilment – personal growth, autonomy	Independence	Independence	
Career progression	Achievement				Achievement	Achievement, challenge	
Influence	Power	Power	Managerial competence	Power - influence	Leadership	Supervision	
Legacy		Recognition		Recognition – respect/status	Recognition	Prestige	Political
Wisdom							
Transcendence	Spirituality						Religious
Social contact		Affiliation		Relationships - team belong		Co-workers	
Integrity							
Connection				Relationships – avoid alone	Support		
Openness							
Collaboration							
Inclusion							
Altruism	Benevolence	Altruistic	Service, dedication		Benevolence		Social
Tradition	Tradition	Tradition					
Culture		Aesthetic					Aesthetic
Harmony							
Libertarian	Conformity				Conformity		
Accountability	Universalism						

VbIM = Values-based Indicator of Motivation

SVS = Schwartz Value Survey

HMVPI = Hogan Motives, Values & Preferences Inventory

SCAQ = Schein Career Anchors Questionnaire

WIS = Work Interest Schedule

GSPV/SIV = Gordon's Survey of Personal & Interpersonal Values

SWVI = Super's Work Values Inventory

AVLS = Allport, Vernon & Lindzey Scale.



## Applications

An understanding of values can play a significant role in many areas. Some of the areas in which it is most commonly applied are introduced below, though this should not be seen as an exhaustive list and users of the VbIM questionnaire are encouraged to adapt and build on these examples.

**Personal and career development** – The VbIM is best viewed as part of a process that allows a respondent to reflect on their core values. The individual values and the model on which VbIM is based provide a method of structuring a review of results and, importantly, provides a common language for the respondent and a facilitator to work with.

Development will be most effective when questionnaire results are integrated with the respondent's personal experiences. Respondents may be encouraged to recall specific experiences, analyse the value-related elements of these experiences and relate them to their VbIM results.

**Team development** – Organisations increasingly rely on team performance for their overall success, though these teams may be loosely structured, exist only for the duration of a specific project and may not be co-located ('virtual' teams). Diversity in teams is widely recognised as being a strength, but with diversity come differences that can be the source of conflict and impair the co-operation and collaboration.

Without a constructive appreciation of the diversity of values that exist within a team problems can arise and success 'derailed'. VbIM provides a powerful way of looking at the values that are held within a team and bringing them to the surface. Team members can then start to appreciate the different perspectives that different values bring and how these can affect trust, cooperation and individual decision making.

**Recruitment** – The values assessed by the VbIM questionnaire will have a significant impact on performance in a wide variety of job roles, giving it obvious appeal as a 'selection' instrument. However it should be appreciated that if it is used in this context it must not be employed to select a candidate 'in' or 'out', rather it can provide background information on values and motives that can be used within the interview process.

VbIM is a behavioural measure so the items are relatively transparent and open to faking or deliberate distortion. To reduce distortion, careful administration is important, as is exploration of results with the respondent to obtain evidence to support or challenge the obtained profile – hence the use of the results within an interview. As with any selection technique, it is important that use of the VbIM questionnaire is based on a thorough job analysis and its effectiveness subsequently validated.



## **Section Two: Development of VbIM questionnaire**

### **How was the need identified?**

This project began as a result of running workshops where people were exploring the concepts of leadership, motivation and emotional intelligence. These workshops involved exploration and experimentation and we used different approaches with different groups. However, one important element involved answering questions like “why should anyone be led by you?” and “how can you inspire others if you can’t inspire yourself “ followed by “what is it that does inspire you?” This invariably brought the discussion around to the issue of values – both of the participants and of the people they were leading. However, people often had difficulty articulating their values and in particular they had difficulty grasping “how important” these values were to them. We experimented with using values questionnaires and often found a mismatch between what people said and what the questionnaires measured. It became apparent that people needed help to articulate their values and help with establishing whether they were really important or simply beliefs that had little practical impact. During some of these workshops we experimented with lists of value labels – sometimes as many as 50 potential scales and this rapidly led to the identification of values that were not represented in mainstream questionnaires. Having identified what was missing the task became one of developing a new questionnaire that reflected the motives and values of the modern workforce.

### **Early versions of VbIM**

There have been 3 previous versions of VbIM as it has undergone increasing refinement over a period of 5 years. Initially a large pool of items was generated relating to the 25 scales that best represented the values emerging from the workshops. These were considered sufficient to provide a comprehensive map of the values domain. The act of producing items also helped to clarify whether a concept can be described in a discrete (no overlap with other values), succinct and understandable way. Together with close reference to the literature the final number of scales was reduced to 20.

The items in each scale were derived in a rational way by considering the preferences that would attach to each value. For example, when considering Reward as a value it is necessary to consider both its materialistic and non-materialistic aspects. Someone who values reward will be motivated by the thought of wealth and the symbols of success; someone who does not will probably be more interested in what they do in a job, or perhaps in the social environment of work, rather than what they get for doing it.

Statements were reviewed by up to three occupational psychologists as well as other experienced assessors to ensure that they were clear and reflected behaviours that could be readily rated. To do this, the reviewers were instructed to think of a target person and check whether they could confidently give that person a rating on each item. A number of changes were made to the statements as a result of this review and a final screening conducted to ensure that none of the items could be construed as offensive or as asking for information of a private nature. So for example none of the items ask about criminal or illegal behaviour, racial or political attitudes etc.

**Version 1:** The first questionnaire was put together in 2003 and involved 5 areas and 20 scales. This questionnaire was trialled on a sample of 854 and both item analyses and factor analyses were conducted. It became clear that several of the scales were complex (or confused) and that the factor analysis did not support the rational model. However, this provided some useful insights into the nature of some of the scales and a new set of scales was devised which split some of the existing scales and with some further scales from the original list.

**Version 2:** the second version was an attempt to increase the reliability of the scales. Each scale was refined and the new questionnaire was trialled on a sample of 7,580. Whilst the individual scales showed greater coherence the factor structure again gave little help and we failed to make meaning out of either the 3, 4 or 5 factor solutions.

**Version 3:** The 3<sup>rd</sup> version of the questionnaire involved a major rethink. We returned to the literature and sought a new stimulus for guiding the next version. This came from the old Buddhist philosophy of the elephant trainer and new scales were defined and this version was trialled on nearly 1,192 people. The factor analysis suggested some interesting ways to structure the values domain involving a group versus an individual focus and another theme suggesting a timescale difference in terms of immediacy of satisfaction contrasted with values that lasted longer or had deeper meaning.

**Version 4:** The factor analysis from the 3<sup>rd</sup> version guided us to create the final round of development which involved adjustments to some of the items to improve the consistency of the scales. This version was trialled with eight items per scale (192 items in total) and these were reduced to 6 items per scale in the published version. The results from this 144 item version are described in this User's Guide.

There are no correct or incorrect responses to the items in the questionnaire and so there is no need for faking or consistency scales. Each item relates to only one scale and so there is no overlap among the 24 scales.

In parallel with the process of constructing the questionnaire considerable effort was put into producing a questioning and scoring system that would reflect a person's 'true' values. Again, after various prototypes, it was decided to adopt a rating (normative) and ranking (ipsative) approach. The reasoning behind this method is described in some detail in the following pages.

## The ipsative component of VbIM

Depending on the purpose of any given assessment, there are **two** possible kinds of information one might wish a values questionnaire to provide. **Firstly**, one might wish to know whether an individual places greater or lesser importance upon a particular value area than do other people - i.e. one might wish the questionnaire to provide information of a normative kind. **Secondly**, one might also be interested in the relative ordering of values within the individual. This kind of information is particularly relevant if the purpose of the questionnaire is at least in part to try to understand how the particular balance of values within an individual might motivate that person to behave in one way rather than another in a given situation. Indeed, the underlying rationale of the VbIM was that it should help to clarify how the behavioural choices made by an individual are dependent, at least in part, upon a person's values. In this sense, we are looking for information of an ipsative or intra-individual nature.

For this reason, the decision was taken during the initial development of the VbIM to include an ipsative component in the questionnaire in addition to a normative component. However, before discussing what form the ipsative component eventually took, it is worthwhile briefly reviewing the use of ipsative methods in questionnaire construction.

Over the last 60 years or so, the term 'ipsative' has come to be used in at least **three** quite distinct senses:

### (a) Classic 'ipsative' questionnaires

The classic sense of the term 'ipsative' is to describe a questionnaire which is intended to describe only the relative strengths of traits within an individual, without reference to the normative standing of the individual on the traits in question. One of the earliest examples of this approach is the Study of Values (Allport, Vernon and Lindzey, 1965).

The Study of Values uses two different methods of assigning scores to items. In Part 1, statements are presented in which two different values are contrasted. The respondent is asked to evaluate two response alternatives, the first of which implying agreement with one of the values in the statement and the second of which implying agreement with the other value. A maximum of 3 points can be assigned to the two response alternatives, with the possible response patterns being 3:0, 2:1, 1:2 and 0:3. In Part 2 of the questionnaire, a statement is presented followed by four response alternatives. The respondent is asked to rank the four response alternatives by assigning to them the numbers 1, 2, 3 and 4.

The methods encapsulated by both parts of the questionnaire differ from the more common Likert scale approach in that the respondent is constrained in relation to the numbers that can be assigned to each response alternative. For example, in Part 2, once the rankings of 4 and 3 have been assigned, only the rankings of 2 and 1 are available for the remaining two response alternatives. The methods used in the Study of Values constrain the values that can be assigned, whereas a Likert scale approach would enable each response alternative to be assigned the same number.

Mathematically-speaking, we can say that the response methods used in both parts of the Study of Values both involve the constraint that the sum of the numbers assigned to each response alternative must sum to a constant; in Part 1, the constant is 3 and in Part 2, the constant is 10 (i.e.  $1 + 2 + 3 + 4$ ). It follows from this that since the response alternatives provided for any given item relate to different scales on the test, the scores which are finally assigned to the scales will also be constrained in the same manner. In other words, the score assigned to Scale 1 of the test will at least in part, depend on the score assigned to Scale 2 of the test and so on.

Precisely the same reasoning as the above applies to a variety of other possible item formats. For example, a forced-choice format in which two statements are shown and the respondent must choose the one he/she prefers is subject to identical mathematical constraints, more or less no matter how it is scored. Scoring of 1 for the preferred and 0 for the non-preferred statement implies that the scores assigned to the pair of items must sum to the constant 1. Assigning 2 for the preferred and 1 for the non-preferred implies that the assigned scores sum to the constant 3. Likewise, a format in which a person must choose the most-preferred and least-preferred statements from a set of 4 might be scored by assigning 2 points to the most-preferred, 0 points to the least-preferred and 1 point to each of the intervening statements, the constant to which the total points assigned sums here being 4. In such alternative formats, wherever the statements presented in any one item represent different scales on the questionnaire, then the constraints applied at the item level will carry over to the scale level, with the scores assigned to any one scale being at least partially dependent on the scores assigned to the other scales.

However it should be noted that the mathematical constraints discussed above, although characteristic of the response formats used in ipsative questionnaires, have nothing whatsoever to do with 'ipsativity' in the originally intended sense of this term. Item formats in which assigned responses sum to a constant are no more deserving of the term 'ipsative' (*Lat: 'pertaining to the self'*) than are Likert scale items which to an equal degree, and some might argue even more so, reflect the relative strengths of traits within the individual. Unfortunately, as we shall see below, this has led to the term ipsative being applied to questionnaires which are not in any sense intended to provide intra-individual information, simply by virtue of the fact that they use item formats which have typically been associated with truly ipsative questionnaires. For this reason, in the remainder of this discussion, when referring to questionnaires as opposed to item formats, we shall use the term 'ipsative' in its originally intended sense: i.e. to refer to a questionnaire, the purpose of which is to provide information on the relative strengths of traits within the individual.

One of the consequences of the mathematical constraints referred to above is that it becomes difficult, if not impossible, to compare the scores of two individuals on any given scale. For example, if an individual assigns a total of 40 points by means of ranking items, then this score reflects not simply the strength of the underlying trait for that scale but also the strengths of the underlying traits for each of the remaining scales. The same number of points might be assigned to the same scale in the case of a different individual. However, this does not mean that the strength of the trait in the two individuals is the same. All that can in fact be compared is the relative standings of the entire set of traits within the two individuals. For example, if in both cases, a particular scale is assigned more ranking points than any other scale, then it can be inferred that the underlying scale is the most important for both individuals.

Nevertheless, this is not to say that comparisons between individuals are not possible with ipsative item formats. If the ipsative scores are referred to norms, this then becomes possible. However, as we shall see, this approach has the disadvantage that the intra-individual information then becomes lost.

### **(b) Norm-referenced questionnaires which use ipsative item formats**

Questionnaires which fall into this category combine (i) the use of item formats typically associated with ipsative questionnaires with (ii) interpretative techniques found in normatively-based instruments. Such questionnaires require respondents to compare items from different scales (either by means of forced-choice comparisons or by means of rank-ordering) in order to assign a preliminary 'score' to the scale. The scale scores are described as 'ipsative' since they are not independent of one another choice task that in the set must effectively sum to a constant. Following the initial stage of scoring, these scores are then compared to those obtained from a normative sample and the final scores for an individual are then effectively expressed as deviations from the mean of the sample, using one or other typical standard scale.

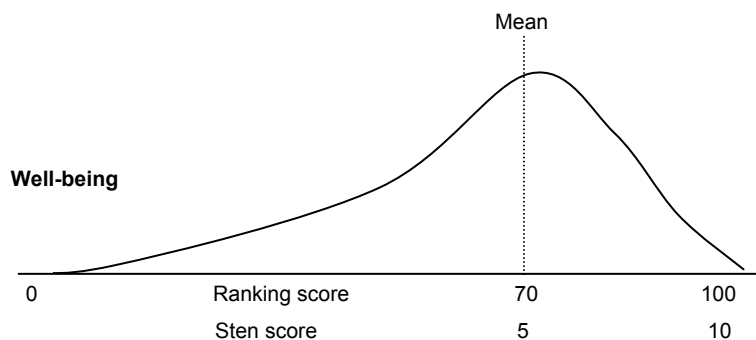
The rationale for this method is that it helps to overcome the problem of response bias typically associated with Likert items (Bartram 2006, Baron 1996), yet nevertheless overcomes the difficulties of the classical ipsative method by enabling the resulting scores of the individual to be evaluated by reference to a comparison group.

Although such questionnaires are often described as 'ipsative', their purpose is not (however) to provide information of a truly ipsative nature. Their intent is to make use of ipsative methodologies in order to handle some of the response bias difficulties of Likert scales, while at the same time producing what is essentially normative information. This fact is not always fully understood, particularly amongst test users who often believe that the purpose of such 'ipsative' questionnaires is to provide information of an intra-individual, rather than inter-individual nature.

For this reason, it is worth pursuing in a little more detail just what inferences can be made from the results of a norm-referenced questionnaire using ipsative item formats. Let us consider a 20-scale questionnaire for assessing strength of values in which the maximum number of points which can be assigned to a scale by ranking or forced-choice methods is 100 points. Consider firstly one scale called Well-being and suppose a given individual has assigned the maximum number of 100 points to that scale and no other scale receives the same number of points. Assuming a well constructed test and carefully constructed item comparisons, it will follow from this that this value is more important to the individual than any of the other values covered by the questionnaire. Let us now represent diagrammatically the process of referring this score to a set of norms.

Firstly, given the nature of human values, we must expect that the mean raw ranking scores of the 20 scales will vary markedly within the reference group. We have every reason to expect that some values will generally be considered more important than others and for this reason, those values will generally be allocated more points in the ranking tasks than other values. This is self-evidently the case if we consider the unlikely possibility that the test constructors had mischievously inserted a scale into the test for "Doing one's buttons up in the correct order". Clearly the mean number of points allocated to this scale within the comparison group would be very low and, we would imagine, lower than the mean number of points allocated to any of the other scales. Suppose then that the value Well-being is generally ranked more highly than other values by the reference group. We would expect the distribution of ranking points to be something like that shown in Figure A below, with the mean of the sample being, let us say, 70 points.

Figure A: Illustrative ranking scores for a single scale



The shape of the distribution merely reflects the assumption we are making for the sake of the present argument that Well-being is something which is generally valued highly within the population at large. The individual who has assigned the maximum number of 100 points to this scale will fall at the extreme right of this distribution and we shall suppose his raw score of 100 points converts to a sten score of 10. The normative inference we then draw is as follows: *"The extent to which this individual has shown a preference for Well-being over other scales is considerably greater than is typical for the comparison group as a whole"*. Note that this inference is stated not in terms of how much the individual values well-being but in terms of the extent to which he has ranked it more highly than other scales, since this is what the raw ranking points reflect.

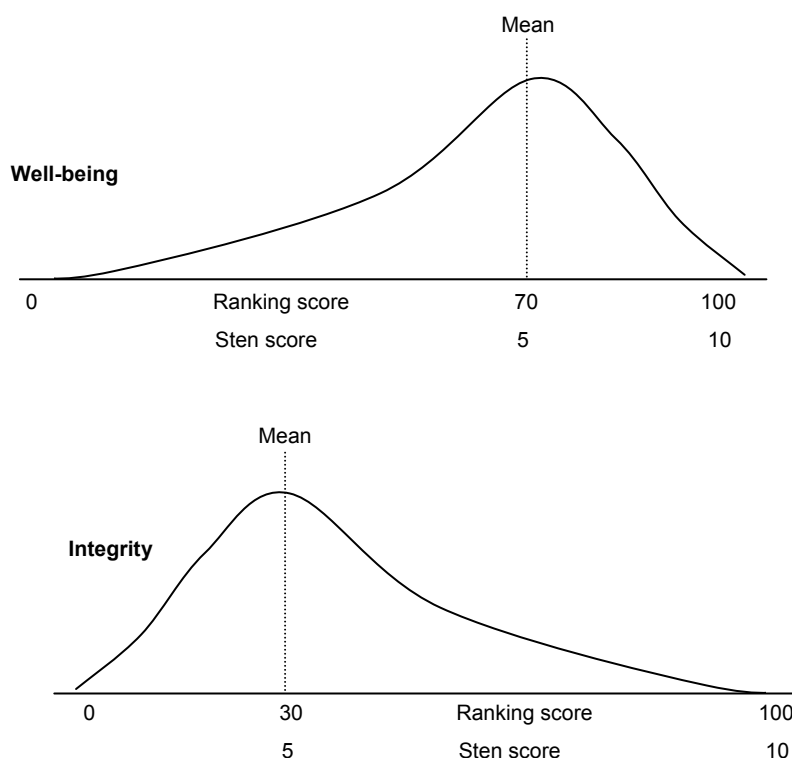


If we now consider an individual who has assigned 70 points to well-being, the inference we make is that *"the extent to which this individual has shown a preference for Well-being over other scales is no greater or no less than is typical for the comparison group as a whole"*.

Let us now ask whether it is possible in principle to make a comparison between these two individuals. There has been considerable discussion in the literature as to whether it is possible to compare the scores of individuals on questionnaires such as this (for example, Bartram, 2006), but let us suppose that the questionnaire at hand meets the conditions proposed by Bartram to allow such comparisons: that is, a sufficient number of scales and low underlying correlations between the constructs being measured. In principle, it appears perfectly reasonable to assume that the idiosyncratic ranking of well-being amongst the entire set of values is markedly higher for Person 1 than for Person 2. This is clear from the raw ranking scores alone - but the important issue at present is that it is also clear from the normative scores. At least in principle, it appears that the normative scores provide a reasonable basis for indicating the extent to which one individual ranks a given value more highly than another individual does. But how about intra-individual comparisons? Is it possible from the normative scores to discover whether one individual ranks a given value more highly than he/she ranks another value?

Consider Figure B. This shows hypothetical comparison group distributions both for Well Being and for another scale, Integrity. We shall suppose that within the comparison group, Integrity is considered generally of less importance than Well-being and also less important than many of the other values covered by the questionnaire. In the case, of integrity the distribution of raw ranking points is skewed to the left. The mean of this distribution we shall suppose to be 30 points.

Figure B: Illustrative ranking scores for two scales



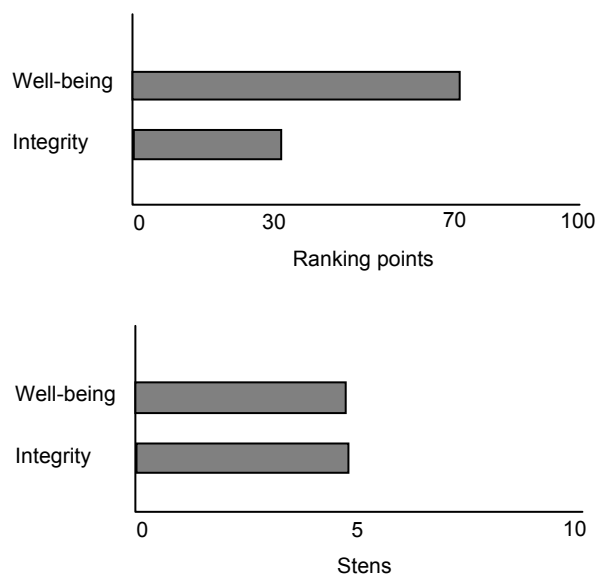
Consider that a given individual has assigned 70 points to Well-being and 30 points to Integrity. It is clear from these raw scores that, when making comparisons between the entire set of scales, this individual views Well-being to be of greater importance than Integrity. However, for both scales, the raw scores convert to a sten score of 5. The normative inferences are as follows:

*"The extent to which this individual has shown a preference for Well-being over other scales is no greater or no less than is typical for the comparison group as a whole."*

*"The extent to which this individual has shown a preference for Integrity over other scales is no greater or no less than is typical for the comparison group as a whole."*

The normative inferences clearly fail to capture information in relation to which values are ranked most highly within the individual. The point can be illustrated (simply) by the profiles for these two scales as captured, on the one hand, from the raw ranking scores and, on the other hand, from the normative scores - see Figure C.

Figure C: Hypothetical profiles for two scores derived from raw ranking scores and normative scores



It is important to understand that (the breakdown in the capacity of) the normative scores fail to convey intra-individual information, as illustrated in the above example, because of the hypothesised difference in the distributions of the ranking scores between the two scales. In the field of values, there is every reason to expect that some values will be regarded more highly than others in the population at large and for that reason, we expect to see differences in the distributions of ranking scores across different scales. It is also possible that such differences may also occur in the field of personality assessment, though here the issues are slightly different.

In personality assessment, ranking or forced choice items typically ask the respondent to consider which of several attributes (as expressed in specific statements) are most typical of him/herself - for example, the format in which a person must indicate the 'Most like me' and 'Least like me' from a set of four descriptive phrases. When the sum of assigned ranking points for a scale is referred to the scores of the comparison group, the normative inference will be of the form: *"The extent to which this individual considers <scale in question> more characteristic of him/herself than other traits is <no greater or less than> <far less than> <far greater than> what is typical for the comparison group as a whole"*. If we consider two scales, say Extraversion and Sociability, the issue will be whether, within the population at large, people tend to consider Extraversion to be characteristic of themselves to a greater extent than they do Sociability. This is not a simple matter to determine as not only does it depend on the personality characteristics of people in general but also to a considerable extent on the nature of the items used to assess (and so, for the purpose of the test, to define) the characteristics in question. This is a matter that could be determined empirically only by determining the actual distributions of ranking points for different scales within a representative sample. From the point of view of test construction, the only way in which it would be possible to guarantee that normative scores would be able to reflect intra-individual information properly would be to ensure that the distributions of ranking scores were approximately equivalent for all scales. This would require many iterations of item writing and testing to achieve and would be a very considerable task.

### **(c) The use of ipsatized normative scores**

A third sense in which the term 'ipsative' has been used is in relation to so-called 'ipsatized scores'. This method does not use the classic ipsative item formats but is typically based on Likert scales as used in conventional norm-referenced questionnaires. The method involves subtracting from each scale score the mean of all scale scores and this effectively locates each profile about the same mid-point (Bartram 2006). The purpose of using ipsatized normative scores is not in any sense to generate truly ipsative information but rather to help overcome the several kinds of response bias that are associated with norm-referenced questionnaires. The raw score for each scale is in effect transformed in such a manner that it can be interpreted in the context of the respondent's idiosyncratic use of the Likert scale.

### **Development of the ipsative ranking task used in the VbIM**

As stated above, the purpose of introducing an ipsative component to the VbIM was in order to allow inferences to be drawn in relation to the relative strength of values in any given individual. Of the three methods described above, only the first (the classic ipsative method) would appear able in principle to achieve this objective. Norm-referenced questionnaires which use ipsative formats appear not to provide a sound basis for assessing intra-individual differences and the use of ipsatized scores clearly has nothing to offer. Of the methods reviewed above, only the classic approach appeared to be worth consideration.

However, since the VbIM was also intended to produce normative information, the use of a classic ipsative item format would have meant either producing two different questionnaires (one normative and one ipsative) with entirely different item formats or including both formats within the same questionnaire, so creating an extremely long questionnaire. Neither of these alternatives was considered acceptable. Instead therefore, we considered an alternative approach which would involve the respondent rank-ordering the 24 values directly via a simple description of the value. This task would be additional to the existing Likert-scale section of the questionnaire and would be undertaken after the Likert section had been completed. We considered that such an approach would not work in the case of a pencil-and-paper questionnaire because, we wondered if we might be able to make use of computer technology, to turn this into a viable method and to overcome some of the problems, both practical and psychometric, which such an approach might otherwise face.

In particular, two problems of a technical nature had to be overcome. Firstly, rank-ordering 24 entities at a time is an extremely difficult task. Our preliminary investigations with presentation methods led us to believe that around 12 entities was the maximum number that an individual could easily rank. The difficulty here is not so much that of discrimination, since the difficulty of separating two entities competing for say position 17 out of 24 is in principle no more difficult than that of separating two entities competing for (say) position 2 out of 5. In both cases, the same entities are being compared and the individual can either discriminate between them or he/she cannot. Rather the problem is one of managing so many discriminations at the same time. It may be difficult enough to decide which of two items is the more important, never mind the difficulty of deciding if they should be 3rd or 4th in the list or 13th and 14th.

It was decided therefore to split up the ranking task into two stages: a first stage in which the 24 values would be separated into 'More Important' and 'Less Important' groups and a second stage in which those values in the More important group would be rank-ordered, followed by rank-ordering of the values in the Less Important group. For quasi-technical reasons, the constraint on the initial sorting into two groups was that neither group should hold more than 13 values. Specifically, this was so that if 12 items had already been assigned to each group, there would always be room for one to be added to one group, so that another could be removed to the other group when fine-tuning the split (see below). This meant that the subsequent rank-ordering tasks in the second stage would involve a minimum of 11 elements and a maximum of 13.

A second problem faced by this approach, and one of a psychometric nature, was that we would be asking respondents to make distinctions between the 24 values on the basis of a description of the value consisting of just a few words (i.e. of no greater physical length than could be easily manipulated on a standard computer screen). This would be equivalent to creating a one-item-per-scale questionnaire; i.e. a questionnaire in which each scale was represented only by a single item. Quite aside from the problem of scale reliability, this posed considerable problems in terms of domain sampling since the 24 value scales are relatively complex entities, each defined in terms of a number of component elements. The principal constraints we faced here were the size of the computer screen and the degree of visual and informational complexity the respondent could be subjected to at any one time.

Whereas the ideal would have been to present on-screen full and detailed definitions of each value during the ranking task, screen space and the likelihood of information overload made this impossible.

The technical solution adopted was to accompany the simple definitions which occupied the principal positions on the screen with a system of mouse-over popup panels not unlike the 'tool tips' frequently used in modern software. In the initial sorting task in which the values were to be sorted into More and Less Important boxes, the simple definition of the value area would appear at the top of the screen and, on its appearance, the pop-up panel would display immediately below and to the right of the simple definition, so calling the respondent's attention to it. The pop-up panel would show the extended definition of the value area and would include the essential elements of the scale as identified via the earlier factor analytic studies. When the person clicked on the simple definition in order to drag it to one or other of the two boxes, the popup panel would disappear. At any later stage in the sorting task, the pop-up panel would re-appear beneath a value description if the mouse were held for once second or longer over the description. This was required since once the preliminary sorting had taken place, respondents were encouraged to fine-tune the sorting by swapping values from one box to the other until they were happy with the division into More and Less Important boxes.

A similar approach was taken in the subsequent ranking tasks. In these task, the simple descriptions of the values to be ranked would appear in a table with the phrase Most Important above the table and the phrase Least Important below the table. The respondent's task would be to drag each simple descriptor up or down the table to its appropriate position. On holding the mouse over the description for approximately one second, the pop-up panel would show displaying the extended definition of the scale.

For both sorting and ranking tasks, the appearance of the pop-up panel was programmed in such a way as to be slightly 'intrusive'. In other words, merely resting the mouse over a statement for one second, would cause the pop-up panel to display. The timing of this was judged as a result of careful experimentation in order to create a scenario whereby, the additional information would impose itself on the respondent, so making it more difficult to ignore. It was hoped in this way to ensure that both the initial sorting task and the final rank ordering tasks would be based on a relatively full appreciation of the domain of each value rather than upon the simple descriptor.

A further issue faced during the development of the ranking task was that of ensuring appropriate 'item strength' for the simple descriptors and their extended definitions. This is an issue which is frequently faced in test construction. For example, the Likert item "I often feel very depressed" is clearly of greater item strength for a scale of depressive tendency than the item "I sometimes feel a little down". This issue has relevance both in relation to the strength of items within a single scale and also in relation to possible differences between overall item strength from one scale to another.

In the case of the VbIM ranking task, the issue has to do with the extent that the simple descriptor for one scale might in some sense have greater item strength than that of another scale. This is not a simple matter to deal with since it is not clear how one should evaluate the difference between the strength of items from entirely different domains. However, an example will illustrate the possible problems. Suppose that to represent the scales Well-being and Integrity, the descriptors "*Putting ones health above anything else*" and "*Principles and integrity*" were respectively to be used. It is clear that the first of these implies a high degree of adherence to the value in question whereas the latter does not imply any specific degree of adherence. The implied high degree of adherence to the former might make some respondents less inclined to rank this value highly than if it had been expressed in a more neutral way. In constructing the simple descriptors and their extended definitions, attempts were therefore made to ensure that these did not imply any degree of adherence to the values in question and were expressed in terms that were as neutral as possible. By way of illustration, some examples of the descriptors eventually chosen are as follows:

*Belonging and having roots*  
*Being caring and doing things for the good of others*  
*Tradition and continuity with the past*  
*Change and progress*  
*Tolerance and harmony*  
*Freedom and individuality*

It was considered that such descriptors did not contain any a-priori characteristics which would influence their ranking and that the final ranking of the descriptors would be determined only by the respondents' view of the relative importance of the values to themselves.

### **Assessing the reliability of the ipsative component of the VbIM**

If reliability is interpreted in terms of domain sampling, then the methods described above would hopefully increase the reliability of the task itself. Nevertheless, the fact remains that only one single score is available for each scale from this method. In terms of the data available, it is still a one-item-per-scale test. Added to this is the fact that the data from the ranking task is ordinal in nature, so making it inaccessible to classical methods for assessing reliability. What can be easily assessed however is reliability over time on a test-retest basis and this can be estimated easily by means of the Spearman Rho correlation coefficient which is suitable for ordinal data.

Of interest also is the correlation between the rankings and two other sets of data: the rankings of the normative scores (based on the Likert ratings from the first part of the questionnaire) and the rankings of the raw scale means of the Likert ratings - though caution will be necessary in both cases.

Considering firstly the correlation of ranking scores with the means of the raw Likert scores, the particular problem here is that of possible differential item strength across scales. Mead (2004) has discussed this problem in depth and has shown that considerable distortion of raw scores can occur if the item strength (referred to by Mead as 'Item Threshold') of ipsative items is not equated in any single comparison. Although Mead's argument is phrased in the context of ipsative item formats, it applies in equal measure to the raw scores from Likert scale items. To adapt one of Mead's examples to the normative case, consider four Likert-scale items measuring the traits of Extraversion and Conscientiousness:

Item 1 (measuring Extraversion)—I quite like going to parties.

Item 2 (measuring Extraversion)—I feel at ease with people.

Item 3 (measuring Conscientiousness)—I follow a schedule at all times.

Item 4 (measuring Conscientiousness)—I continue until everything is perfect.

In theory, a person who has equal and average levels of the two traits (to the extent that this could ever be determined) would be inclined to assign relatively high ratings to Items 1 and 2 but relatively low ratings to Items 3 and 4. This is not a problem if the scores are to be referred to norms. However, it does mean that the raw mean ratings of the scales would not be a good indicator of their relative ordering within the individual. Unless therefore considerable effort were taken to match the population means of scale items in the initial item development phase, the correlation between the rankings from the ranking tasks and the item means would underestimate the underlying true correlation.

Turning to the correlation between the ranking scores and the normative scores, one might expect a degree of correlation between these two sets of scores, but only a degree. On any given scale, a high normative score via the Likert data implies that the person rates that value higher than most people in the comparison group. A high ranking score implies that the person rates the value higher than most other values in the set. Consider therefore a value that is ranked 3rd out of the set of 24. In the absence of any additional information, this high ranking in itself will increase the likelihood that the normative score for the same scale will be relatively high, assuming that is that both the Likert scores and the ranking task are reliable and valid measures of the trait in question. However, it may be that the overall mean of the Likert ratings on all scales for this individual is considerably lower than that of the general population. Thus, this individual might get low normative scores on all scales. Under these circumstances, the correlation between the rankings and the normative ratings would be effectively restricted by the restriction of range in the latter. This would be the case even where non-parametric methods were used to assess the correlation between the rankings and the normative scores.

The fact that we expect less than a perfect correlation between the ranking scores and the normative scores in fact captures the very purpose of including an ipsative component to the VbIM. When feeding back normative data, we effectively tell the individual whether the importance he/she places on a given value is greater or less than what is typical in the comparison group. When feeding back the ipsative data, we tell the person which of the values are most important for him/herself and which are least important. Equipped with only normative data, we might convey to the individual that he/she values 'Well-being', say, less than most people in the comparison group. Armed also with the ipsative information, we might be able to add the additional statement that Well-being is nevertheless one of his/her most highly ranked values and is therefore likely to be one of the most important determinants of his/her behavioural choices in any given situation.



## Section Three: Administering the questionnaire

The VbIM questionnaire is part of the Profiling for Success (PfS) online assessment system developed by Team Focus. To use the questionnaire clients have to open a PfS account. Once a PfS account has been opened, this allows clients to manage all aspects of the assessment and reporting process. For information on opening and using a PfS account, please contact Team Focus (contact details are given at the front of this User's Guide).

Effective administration is important if VbIM is to provide valid information. With the PfS online assessment system, assessments may be completed after a personal introduction from the administrator or after the respondent has been informed about the assessment by other means such as email or a letter. Whichever administration process is used, it is essential that respondents understand why they are being asked to complete the questionnaire and how the information they provide will be used for their benefit. This ensures 'buy in' to the assessment and so encourages honesty and openness from respondents.

In this section, options for administration are described along with guidance on how to conduct effective administration, whether in person or remotely. Details on the actual process of administration are also included along with the technical requirements of the PfS system.

### Administration process

There are three options for administering VbIM:

- completion with an administrator present who gives the introduction;
- independent completion after a prior face-to-face or telephone introduction by an administrator;
- independent completion after receiving an introduction via email or letter from an administrator.

The questionnaire does not necessarily require an administrator to be present, and has been developed and trialled accordingly. Full instructions are given at the beginning of the questionnaire, along with examples to ensure that the respondent understands how to indicate their responses and use the six-point response scale. Whilst completing the questionnaire, respondents can also see a summary of the instructions at any time they wish.

Although an administrator does not need to be present at the time of completion, it is essential that the personal aspect of administration is not underestimated. Nor should it be assumed that the instructions given with the questionnaire are sufficient in themselves. Good administration, whether in person, by phone or via letter or email, is key to getting the 'buy in' of the respondent to the assessment process. This, in turn, will enhance the validity of the assessment profile through putting respondents in the appropriate mindset, and encouraging open and honest responding.

An introduction to VbIM should include the following points, whether delivered in person by the administrator or otherwise:

- the reason the respondent is being asked to complete the questionnaire;
- a broad description of what the questionnaire assesses, possibly including an overview of the VbIM model, though there is no need to include a detailed description of each scale;
- the importance of being as honest as possible when completing the questionnaire;
- guidance that the VbIM is untimed but typically takes between 20 and 40 minutes to complete. Respondents should work through at their own pace but be advised that sometimes, spending a long time pondering the questions can make it more difficult. Whilst first answers are not necessarily the best (since they may reflect some habitual response rather than a carefully considered one) they can provide a useful starting point for exploring a person's value system;
- an explanation of how the respondent will receive their VbIM profile and how this will be used;
- a description of how the profile will be stored and who will have access to it.

When an administrator will not be present whilst the respondent completes the questionnaire, the following information should also be given:

- the URL respondents should go to for access to the PfS website ([www.profilingforsuccess.com/main](http://www.profilingforsuccess.com/main));
- the Client code, Access code and Password they will need to enter when prompted;
- that the questionnaire normally takes between 20 and 40 minutes to complete and that it should be completed in a quiet environment free from distractions;
- contact details for the administrator in case of any questions or issues in accessing the PfS system.

## **Requirements of the PfS system**

As the VbIM questionnaire is delivered via the PfS online assessment system, administrators need to ensure that respondents have the necessary hardware and software to access the assessments. In practice, this is very rarely an issue as the PfS system has been developed to run on standard internet technology to make it as widely accessible as possible.

The requirements for users of the PfS system (clients/administrators and respondents) are:

- a PC or Mac with an internet connection (dial-up or broadband);
- a minimum screen resolution of 1024 by 768;
- Internet Explorer Version 6.0 or later (recommended browser);
- Macromedia Flash plugin.

Virtually all modern computers will meet the requirements. When using Internet Explorer, this will automatically check that the Macromedia Flash plug-in is installed and, if not, prompt the user to install this. Installation of Macromedia Flash should take only a few seconds with a broadband internet connection and is completed without the need for any technical expertise on the part of the user.

When a respondent selects a PfS assessment for completion, the whole assessment is downloaded before it begins. This may take a short time with a dial-up connection (up to one minute for some assessments) but with a broadband connection it will take only a few seconds.

It is not necessary for the internet connection to be maintained once an assessment has been downloaded. However, the internet connection does have to be active when the assessment results are submitted. Information about the need for respondents to be actively connected to the internet for their results to be recorded is displayed at the end of the assessment.



## **Section Four: Interpretation and Review**

This section of the User's Guide describes in detail the groups and individual scales that comprise the VbIM questionnaire. Users need to become familiar with these scales and appreciate how they fit into the VbIM model before working with respondents. It also gives an overview of the scores that are generated from the questionnaire and describes the computer-generated reports that are available.

(The VbIM questionnaire can be used in a range of development situations. Some examples of these have been given in Section One, but these are not intended to be exhaustive and it is anticipated that users will expand on these to meet their own needs). The precise nature of the feedback and review with the respondent will depend on how the questionnaire is being used, but this section gives an overview of a standard review process. Users are encouraged to think of how these ideas may be adapted to best meet their needs so as to ensure the questionnaire has maximum impact on the development process.

### **4.1 Descriptions of the VbIM scales**

The VbIM questionnaire is structured around four major groups:

- What I want for myself
- What I want to become
- What I want from others
- What I want from Society.

In each of these groups there are six individual scales making a total of 24 scales in all. The definitions for each of the groups and their related scales are as follows:

#### **What I want for myself**

This group of values concerns the ways in which an individual gains satisfaction. This can be in terms of immediate reward – either material or the more abstract satisfaction that people can get from their appreciation of art, culture and the world of ideas. Others gain their satisfaction by enhancing their standing in the eyes of others – by being recognised and 'visible' (possibly in the public eye) or perhaps through obtaining the badges and symbols of success. Still others are motivated by a strong desire to feel healthy both physically and emotionally.

## **1. Rewards**

Rewards, such as money and possessions, are important to us all. At one level we need these to survive. They are also the tangible signs of success. Those with rewards as a key value are likely to base the decisions about what they do on the chances of it increasing their material well-being. Reward orientated people can be very hard working and competitive. They can give an enormous amount of energy to their work and they make a very obvious link between the remuneration they receive and how good they are at their job – and hence how successful they are (and perceived by others to be).

## **2. Fame**

Those with Fame as a value usually enjoy being in the limelight and the centre of attention. They have a particularly strong need for recognition and the admiration of their peers, quite apart from the wider community. People with a concern for fame are motivated to create a noticeable public image – and this can sometimes involve being infamous as opposed to famous on the basis that being ignored is even worse. Seeking fame can involve a wide range of activities but at its core is the desire to be visible and recognised.

## **3. Wellbeing**

People who value Wellbeing take an active interest in their physical and emotional health. They strive to create a balanced and happy life that is free from stress and worry allowing them to 'feel well and stay well'. They are concerned with keeping themselves in good shape and are sensitive to what their body tells them. This can be seen through a concern for work-life balance, periods of regular exercise and relaxation, and an interest in healthy eating.

## **4. Excitement**

The primary goal of a person who values Excitement is to have a good time and to arrange life so that there are ample opportunities for fun and recreation. This also tends to be associated with a need for excitement and variety, a wish to 'live for the moment', and not to delay gratification. Often fun loving individuals are fast living, expect instant results, and are not usually weighed down with the 'baggage' of the past.

## **5. Change**

Those who value Change believe that progress is a good thing and preferable to standing still. They are therefore prepared to sacrifice certainty and stability by taking risks in the interest of progress. Some may even feel frustrated or bored by lack of change and may want to engineer opportunities to bring it about. They have little need for a solid, organised and predictable future and may react against too much regulation and control even when this is in their own interest.

## **6. Conceptual**

Those who value the Conceptual want to make, and be seen to make a difference with their analytic or creative thinking. They welcome the opportunity to use their intellect to grapple with challenging situations and to be recognised for their ability to be insightful, creative, rational, and/or mentally flexible. Those with a more creative focus are likely to welcome novelty and to have a hunger for continuous improvement, whereas those with a more 'rational' turn of mind often favour a more scientific or evidence-based approach to life.

### **What I want to become**

This area concerns the more abstract values that motivate a person with an eye for the longer term. In as much as people who emphasise this area like to see themselves as growing, changing and contributing in some way. They may emphasise the development of their skills and competencies, the progression of their career or how to grow the ability to lead and influence others. Others may value development in more abstract terms such as mental, emotional or spiritual growth. A feature of this group of values is the ability to stand back from the day-to-day, to view the 'bigger picture' and to develop a deeper and richer understanding of both themselves and the world around them.

## **7. Personal Growth**

People who value Personal Growth seek new opportunities, and challenges that they believe will enable them to develop their potential. They tend to take personal responsibility for their own development and they usually see this as a life-long process. Their search for new experiences may involve elements of fun and immediate satisfaction but there will usually be a strong focus on the potential for new skill acquisition. They have an agenda of further development of the skills, competencies and experience beyond those that they already possess.

## **8. Career Progression**

People who are concerned with Career Progression are often extremely driven and ambitious. Their energy is focussed on making a success of their work life – although some may achieve this through activities that may not follow a traditional career. Either way, they seek significant challenges that require considerable effort and determination in order to succeed. Their drive can involve working hard to become an expert or working long hours to achieve perfection. It is therefore unsurprising that such people are often described as driven, determined and highly competitive with a strong need to succeed at their chosen activity.

## **9. Influence**

People who place value on Influence are motivated to make a difference – often through their work with (and through) others. This can drive them to seek positions where they have more opportunity to exert influence over people, policy or tasks. For this reason it is not unusual to find them in leadership positions. However, their style in such positions will be highly influenced by their other personal values as well as their personality. Some express themselves by being quite forceful and persuasive. Others can be more subtle or democratic. Either way, they are drawn to the centre of things where they can gain satisfaction from controlling purpose and direction.

## **10. Legacy**

Those who value Legacy wish to be recognised for something they consider to be important and substantive. Unlike Fame (which is more about visibility), Legacy is about making a contribution that has intrinsic value. This may be in terms of making an important contribution to society. Alternatively it can be to achieve recognition for one's skills and talents. Legacy implies concern for a person's epitaph, their reputation or a tribute to their achievements. It places importance on the meaning and value of past efforts, which mean that they are more likely to have some element of longevity.

## **11. Wisdom**

People who value Wisdom focus on how life helps people to develop a deeper understanding, generosity, purpose and meaning. It is less about knowledge and information and more about emotional maturity and forgiveness. Their orientation towards life's difficulties is to turn bad experiences into something from which meaning can be extracted. They tend not to pre-judge people and are less likely to jump to conclusions or make harsh and unfair judgements of them. Harboured grudges, feeling revengeful or becoming bitter and twisted are all emotions that they would like to see becoming alien to themselves and others.

## **12. Transcendence**

Transcendence implies a need to connect with the non-material and non-physical values that help to give meaning to life. To some this will be in the form of a spiritual or religious orientation to life. However, others may see it as involving a meditative or humanistic approach to life. All would see a need for a deeper understanding of what it is to be human and are seeking some channel that embodies or creates it. It often involves some core beliefs and principles, which may involve the concept of a powerful driving force in the universe or may simply involve a strong belief in living by some ethical code.



## What I want from others

This group of scales has a relational focus as people who emphasise this area value interaction, relationships and community. They recognise the importance of creating conditions in which relationships can develop – such as Trust, Collaboration and Integrity and as well as those that focus on the satisfaction we gain from our interactions with others such as Social Contact, Inclusion and Connection. A feature of this group is the importance of other people in a person's value system.

### 13. Social contact

A person who values Social Contact gets enjoyment from interacting with other people. Indeed they tend to be highly social with a great need to have other people around. They enjoy the prospect of seeking out old friends and acquaintances as well as creating opportunities to meet potential new friends. They appreciate pleasant, informal conversation and companionship and often have a friendly and affable nature.

### 14. Integrity

Integrity is a value that implies a strong need to be seen as honest, fair and 'incorruptible'. People who value integrity believe that it is important to be principled and truthful. This contributes to the building of strong relationships through interactions that are based on authenticity – on knowing who and what we are without enhancement or deception. Having integrity also suggests a tolerance of other people, and a sense of fair play, even with someone who is disliked. At work it implies giving the employer a 'fair effort for a fair day's pay' and the customer a realistic understanding of what is being offered.

### 15. Connection

Those with Connection as a strong value indicate that feeling warm, intimate and connected is important to them. They prefer relationships where they can share their deepest thoughts and emotions and usually need to have at least one warm and close relationship that allows them to do this. They are also likely to have a preference for close and warm relationships in general. Such people are not necessarily interested in developing a large network of acquaintances but tend to prefer depth to breadth which is more likely to result in a close inner circle rather than a broad range of acquaintances.

## **16. Openness**

Those who place a high value on Openness tend to be committed to the concept of telling the truth. They believe that the key to a strong relationship requires a commitment to the truth regardless of the consequences and hence can value blunt reality to diplomatic distortion. They recognise that to keep things hidden from others does not, generally, create the best foundation for a trusting relationship. Underlying the concept of openness are honesty and authenticity.

## **17. Collaboration**

People who are Collaborative are concerned with co-operation, participation and consensus. They believe that working together is a valuable goal and are willing to sacrifice other things in order to achieve this. They value the input of others and often work hard to involve people whom they see as part of the team or group. They believe that the whole is greater than the sum of the parts and so will subjugate their own needs for the good of group cohesion. Their approach to decision making is generally to seek opinions and to arrive at a consensus. As a result collaborative people are often less interested in making their own mark than arriving at the best possible solution: they value the process, rather than championing their own particular idea.

## **18. Inclusion**

Those who value Inclusion have a strong desire to feel part of something bigger. They seek a sense of belonging, which can come from joining or being part of a community. This has a longer-term focus than simply making social contact and it drives them to build allegiances with other people or groups where the values involve loyalty, reliability and supporting each other when needed. Some achieve this by staying close to where they were brought up. Others create a community of friends, whilst still others achieve this by joining groups that give them a sense of identity and continuity (e.g. joining a football supporters club, a local gang, the Women's Institute, a local Community Support Group etc.). The underlying need is to establish a sense of group identity, of belonging, of having 'roots' and being 'in' rather than 'out'.

## What I want from society

This group of values has both an interpersonal and societal focus and concerns the values that give meaning to our dealings with other people. It is based on altruism, harmony and respect: the cornerstones of a giving and accepting society or workplace. People who emphasise this area are concerned for the nature of the society they live in and they tend to have a respect for the traditions and legacies of previous generations. They can also see that being part of a society necessarily brings both rights and responsibilities and they sometimes accept the benign use of authority, as well as valuing continuity, security and social order. Ultimately it also concerns the valuing of personal responsibility and the belief that we are all accountable for our actions and their consequences.

### 19. Altruism

Those who consider Altruism to be important aspire to a better, more tolerant and understanding world. They believe in showing concern for the needs of others and they admire people who direct their activities to increasing the sum of human happiness – especially those who are willing to put considerable effort into helping other people, the environment, and the world generally. As individuals they are likely to be understanding, selfless and compassionate, and hope that these values will be reflected in the society in which they live.

### 20. Tradition

Tradition is a powerful value that reinforces the norms and acceptable principles of society. It suggests that there are rules of conduct that regulate behaviour, that sets of values are at the heart of a good society, and often that we should show more respect for the past and our heritage. Those who value tradition are likely to be supporters of the established order of things, and authority, and to place particular emphasis on groupings such as the family or various traditional authority figures and institutions.

### 21. Culture

Some people have a great love of cultural expression in its various forms such as painting, music, drama, dancing etc. These may not have great practical or functional value but people with this value are saying that there are more important things that reside in human imagination and sensitivity. They appreciate aesthetic expression but they also, usually, value self-expression and people who dare to be different. People with this value are likely to promote the importance and richness of human imagination which they see as an important pillar of society. They may see culture as an 'educational' and aesthetic force for good or as a source of intellectual and emotional meaning or as a high form of freedom of expression.

## 22. Harmony

Those who value Harmony believe that, as a society, we need to develop understanding and tolerance. This involves the appreciation of difference and an interest in the 'common good'. They believe that people should make an active attempt to get on with each other and to live in a non-judgemental manner. Harmony implies give-and-take and aspects of respect, but does not necessarily imply authority, or indeed passivity – rather a conscious attempt to amiably cohabit in a complex world.

## 23. Libertarian

Those who value the Libertarian approach to life believe that people should be allowed to follow their own conscience. They often view society as placing unnecessary constraints on individuals and place great emphasis on the concept of individual freedom. A consequence is that they tend to believe in allowing people to choose what they do and how they want to live. They believe that any societal boundaries should be as broad as possible thus enabling people to exercise free will.

## 24. Accountability

The valuing of Accountability is about people taking responsibility for their own actions and choices. It therefore challenges the 'blame culture' where people are often seen as victims of circumstance. Psychologically it is linked to a feeling of control over one's own destiny and not being at the mercy of chance, luck or other people. It leads to the concept of a responsible society as one where the citizens, and those in power, have the moral integrity to be held accountable for their actions. This does not necessarily mean that all people should be blamed for whatever happens to them. Valuing accountability and taking responsibility can co-exist with the view that some people are unable to be responsible for their own behaviour and that society still needs to defend them.

## 4.2 VbIM scores

The results from the VbIM are based on three ways of generating the scores. These are as follows:

1. **General Ranking**; these are the rank positions when the person was asked to consider the scale and its definition and to place it in a list from most important to least important. This is, technically, called an "ipsative" score since it (simply) defines a person's personal hierarchy but does not give an indication of how strongly these values are held or whether they are higher or lower than other people's

2. **Detailed Ranking:** these are also presented as the rank positions of the 24 scales but the position is determined by taking all of the answers to the 144 individual items in the questionnaire. The scores for the 6 items for each scale are summed and this allows all 24 scales to be put in order. However, since the items have different “power” or “strength” the order has been adjusted statistically to allow for this.
3. **Comparative Scores:** these are based on comparing the results for each scale with how others have answered the questionnaire. The results can be expressed as a standardised score (percentile or sten scale) which allows each scale to be interpreted in terms of how much the person values this scale compared to other people. These scores can also be used to rank the scales (i.e. create a hierarchy) but the order now shows which scales are the highest or lowest compared to other people. Clearly this ranking could alter if a different comparison group is used.

These three different ways of presenting the most and least important values can vary in apparent consistency. In considering the results it can be particularly useful to identify and explore why some values may appear higher in one hierarchy than another.

### 4.3 Understanding VbIM reports

Three reports are available:

- a feedback report
- a feedback summary report
- an administrator’s report.

The **feedback reports** contain a comprehensive analysis of the respondent’s self-ratings and rankings. Reports give an overview of rankings and importance and provides narrative interpretation of the results. It also presents the values clustered into the four groupings that are based on the dimensions of group-individual and satisfaction-meaning. The **administrator’s report** provides a summary of the key data derived from the questionnaire. Examples can be found in the appendices.

At an overview level it can be very useful to explore discrepancies between the different scoring methods. Interpreting the discrepancies is not straightforward. For example, other people may rate a value quite low which means that, comparatively, a particular respondent could have high score (and hence a high rank). However, their own perception may still be that it is not particularly important to him/her. The following is therefore designed to help with initiating an exploration and discussion. They are based on an assumption that any discrepancy is worth re-examining. Perhaps we are not as deeply grounded as we say or believe – or vice versa? Whatever the reasons it can be worth spending some time trying to understand the discrepancies and the following wording may help with this discussion:

<b>General &gt; Detailed</b>	<b>Detailed &gt; Comparative</b>
When the respondent considers the general definition these are the values she identifies as being significantly higher than when s/he is asked to consider them at a more detailed level. It is possible that they are not quite as important as she initially thought.	Compared to other people, these values appear lower in the respondent's rankings than s/he states when thinking about the detailed definition. It is possible that they are not quite as important as s/he initially thought.
<b>Detailed &gt; General</b>	<b>Comparative &gt; Detailed</b>
When the respondent considers the detailed definition these are the values s/he identifies as being significantly higher than when s/he is asked to consider them at a more general level. It is possible that they are more important than s/he initially thought.	Compared to other people, these values appear higher in the respondent's rankings than s/he states when thinking about the detailed definition. It is possible that they are more important to him/her than she initially thought.

#### 4.4 Conducting a review session

The results from the VbIM questionnaire should always be reviewed with the respondent. As with the output from any psychometric assessment, the profile should be treated as a starting point for further exploration and clarification. Without adequate review, the respondent may over-interpret the results and place greater emphasis on their validity than is warranted. The review session therefore allows the respondent an opportunity to challenge the results in the report and find a balance between their results and personal perceptions that allows them to move forward in their development. Further, although the questionnaire is generally positively worded, the review also allows clarification of any issues so ensuring that misunderstandings on the part of the respondent do not occur.

The exact format of the review will depend on the purpose of assessment and how the results are to be used. It is recommended that the review is conducted face-to-face, though a telephone review may be acceptable in some circumstances

The reviewer will need to decide whether a report is sent directly to the respondent when setting up the access code for the VbIM. Receiving the report ahead of the review session will give the respondent time to read and start to work through it to identify issues that are particularly pertinent to them. This process will give more time for discussion during the review session and is likely to be particularly beneficial to respondents who need time to reflect on their report before discussing it. Providing that the administration has been conducted thoroughly and respondents understand the purpose of the assessment and how it will be used, there should be no issues in reports being sent directly to respondents. If respondents do, however, seem particularly sensitive to feedback, careful consideration needs to be given to whether reports should be sent directly to the respondent or introduced by the reviewer as part of the review session.

The purpose of a review session, whether conducted face-to-face or via the telephone, is to ensure that the respondent clearly understands the meaning of their results and is satisfied with the assessment experience, and to explore possible implications of the results. To reach this goal it is important that the review session is seen as a chance for information to be shared between the respondent and the reviewer, not simply for the reviewer to provide the questionnaire scores. For this process to be successful, it is vital that all reviewers have received appropriate training and are themselves familiar with the VbIM model and the nature of its reports.

General guidelines for conducting review sessions are given below. These guidelines should be seen as identifying the main points that need to be covered and giving suggestions about the structure of the review session and appropriate questioning strategies. They do not set out to provide a set formula that must be followed.

- As with administration, good preparation is essential for review sessions. A suitable room, free from disturbances, should be used. Reviewers should familiarise themselves with the respondent's results, the VbIM scales and how they may want to introduce the VbIM model as a way of supporting the interpretation. Reports should be sent out to respondents in good time before the review session, if they have not received them directly from the Profiling for Success assessment system.
- The review session should begin with the reviewer introducing themselves and providing a brief overview of the review session (ideally there will have been prior contact but it can be useful to go over these points again). Useful information to offer includes clarifying the overall purpose of the session and how the questionnaire will assist achieve that purpose. It is also useful to clarify the approximate length of the session, issues around confidentiality and what will happen to the questionnaire results.
- Both parties need to agree on what they want to get out of the review session and be clear on how the profile will be used before working through the report. Such agreement will ensure a common purpose to the review, encourage rapport and reduce the chance for misunderstandings.
- To encourage a balanced discussion from the outset, the respondent should be brought into the review session as early as possible. This can be done through asking them about their experiences of the questionnaire immediately after the brief introduction (e.g. "How did you find completing the questionnaire?" or "Tell me about your experience of completing the questionnaire."). Throughout the review session open questions should be used wherever possible, as this will encourage the respondent to provide more information and make the review more balanced. In a balanced review session the respondent should contribute at least as much as the reviewer to the discussion, if not more.

- The next stage will usually involve discussion of the actual questionnaire profile. There is no set order in which the VbIM scales have to be reviewed. If previous discussions with the respondent have identified specific areas of interest, the discussion may focus on these and spend less time on other areas. An alternative strategy is to ask the respondent to identify any areas where the questionnaire has revealed surprising results and start by exploring these. If there are no specific areas being targeted, it is suggested that the review is structured according to the major groupings of VbIM, taking each of the areas in turn.
- VbIM is primarily a tool to stimulate personal development and insight and so the next stages in the development process need to be the focus of the final part of the review. Both parties should mutually agree a way forward. Points that may be included are how the issues that have been discussed will be captured, what actions the respondent has agreed to and time scales for development activities, what support the reviewer or others in the organisation need to give the respondent, and how any development activities will be monitored and reviewed. Finally, the respondent should be offered the opportunity to ask any outstanding questions and then thanked for attending the review session.
- It is good practice for individual organisations to develop policies around the review of assessment results, as with other aspects of psychological assessment. These should cover issues such as how reviews are conducted, confidentiality and storage of assessment data. It is important for organisations to develop their own policies, as these will help ensure consistency of approach and application over time, and will also guard against issues of fairness and discrimination. Whilst policies may draw on the guidelines given above, ultimately reviewers may develop their own style with which they feel comfortable within these frameworks.