# Excerpts from the Manual for The Values Orientations (VO) Assessment

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# 3. The VO Assessment

## 3.1 It's Administration Format and Structure

### 3.1.1The on-screen item format

## 3.2 How the VO is Scored

### 3.2.1 From item Responses to Selected Orientations

Within the VO item-set, certain items within a values orientation item-set are identified as representing the **core 'meaning'** of that orientation.

For each respondent, the ratio *(expressed as a proportion)* of the sum of the actual core-item scores to the total possible core-item sum-score is used to non-linearly adjust the scores of the non-core-item scores for an orientation.

The non-linearity is introduced by an 'inertial' function which amplifies or attenuates the core-item proportion depending on how far it differs from a 0.5 proportion. If the average of core-item scores exceeds 50% of the total possible core-item sum-score, the proportion is amplified relative to its level above 0.5. If the average of core-item scores is lower than 50% of the total possible core-item sum-score, the proportion is attenuated relative to its level above 0.5.

The logic here is based on the proposition that if a person doesn't show much commitment to the core item meaning *(via their slider response)*, then their final orientation score will be small, as the non-core items are given less weight and so contribute less to the total orientation score.

If they do respond with more than an overall average magnitude to the core items, then their orientation score is likely to be higher as the remaining non-core items are given more weight and so contribute more to the total orientation score.

The non-core items are simply those which assess the more-diffuse but still relevant preferences and behaviours which define a values orientation construct. The values orientations are fuzzy-boundary constructs which merge together spatially (the 3-D spiral) and sequentially rather than span linear sequences of discrete/disjunctive boundaries.

The purpose of this scoring logic is to help clarify the pattern of a respondent's orientations by augmenting or reducing final orientation scores based upon the commitment or otherwise to the essential meaning of an orientation as demonstrated by the responses to the core-meaning items.

# The Values Orientations

## Their description

The Value Orientations (VO) reveals an individual's worldviews, their assumptions about life and perceptual orientations. Value systems represent "core intelligences" and act as a decision-making framework that guides behaviour and life choices. Value systems thus provide a structure for thinking, act as organizing principles, and guide an individual's modes of adaptation to the world.

| Characteristics of the Purple value orientation | |
|---|---|
| The Purple valuing system is typically characterised by the following: | Those who reject the Purple valuing system may perceive these characteristics as: |
| • Traditional culture<br>• Protective environment<br>• Religious routines, superstitions or spiritual fears<br>• Group responsibility<br>• Ethnic / family / group belonging<br>• Security focused<br>• Focus on team cohesion<br>• Ethnocentric<br>• Patriotism and loyal to group / leaders<br>• Paternalistic / maternalistic leadership | • Dependent on others<br>• Groupthink / group identity<br>• Not taking personal responsibility<br>• Submissive<br>• Rigid or inflexible<br>• Closed-minded<br>• Family orientated / nepotistic<br>• Superstitious |

| Characteristics of the Red value orientation | |
|---|---|
| The Red valuing system is typically characterised by the following: | Those who reject the Red valuing system may perceive these characteristics as: |
| • Competitive, hard-driving culture<br>• Goal achievement<br>• Adrenalin driven<br>• Reality / external world orientation<br>• Focused on power and achievement<br>• Task and action focus<br>• Driven to overcome obstacles<br>• Follows linear sequences to achievement<br>• Critical and discerning<br>• Survival intuition<br>• Potentially emotional (such as anger)<br>• Focus on desire and sensation<br>• Strong, passionate and inspirational leadership<br>• Likely to have clear boundaries<br>• Power issues, pecking orders, hierarchies, and authoritarian leadership<br>• Keeps different roles in life separate from each other | • Domineering, overpowering, wilful<br>• Egocentric / ego driven<br>• Requires recognition and respect<br>• Fear of failure<br>• Lacking self-knowledge<br>• Can be impulsive, unsophisticated or crass<br>• Views opportunities as scarce<br>• Conflict prone<br>• External locus of control<br>• Effective but sometimes misses nuances<br>• Expects results, may hold grudges<br>• Can be demanding, harsh or inflexible |

| Characteristics of the Blue value orientation | |
|---|---|
| The Blue valuing system is typically characterised by the following: | Those who reject the Blue valuing system may perceive these characteristics as: |
| • Structured and rule-based culture<br>• Driven to create stability and security<br>• Stable, bureaucratic environment<br>• A code of conduct<br>• Clearly specified roles<br>• Honour, responsibility and reliability<br>• Diligence, conscientiousness and dedication<br>• Principled and courageous<br>• Action orientated, but also compliant<br>• May sacrifice for the benefit of the institution or organizational goals<br>• A focus on quality and service orientation<br>• Practical and task-focused<br>• Fair, consistent leadership | • Rigid and inflexible<br>• Traditional and change resistant<br>• Radical and fundamental<br>• Inappropriate emphasis on principles<br>• Low sense of self-knowledge<br>• May miss subtle nuances<br>• Critical and has excessively high standards<br>• Unnecessary self-sacrifice and submission<br>• Needing security<br>• Low focus on individual uniqueness and emotions |

| Characteristics of the Orange value orientation | |
|---|---|
| The Orange valuing system is typically characterised by the following: | Those who reject the Orange valuing system may perceive these characteristics as: |
| • Innovative and entrepreneurial<br>• Strategic / achievement orientation<br>• Capable of change<br>• Empowered to create the future<br>• Focus on personal performance, responsibility and self-expression<br>• Abundance mentality, explores opportunities<br>• Energetic<br>• Calculated risk-taking<br>• Individualistic, strong willed, determined<br>• Politically astute<br>• Aware of image management<br>• Materialistic measurement of success<br>• Resilient<br>• Negotiative, influential leadership | • Status conscious, openly materialistic<br>• Uncommitted to group goals<br>• Manipulative of perceptions, exploitative<br>• Egocentric and can be willful or arrogant<br>• Overly flexible, opportunistic<br>• Focus on perceptions rather than on actual issues<br>• Low sense of structure, certainty, maturity<br>• Careless<br>• Unrealistically optimistic |

| Characteristics of the Green value orientation | |
|---|---|
| The Green valuing system is typically characterised by the following: | Those who reject the Green valuing system may perceive these characteristics as: |
| • Harmonious and equal environment<br>• Relativistic and compassionate<br>• Genuinely cares for people's well-being<br>• Non-competitive<br>• Focus on making a positive impact<br>• Theoretical rather than practical focus<br>• Accepting of others<br>• Intellectual and learning orientated<br>• Explorative orientation<br>• Altruistic, low egocentrism<br>• Develops themselves and other people<br>• Shared decision-making<br>• Participative leadership | • Sacrificial, overly giving<br>• Uncertain, not socially bold, indecisive<br>• Too flexible, overly trusting<br>• Sensitive<br>• Self-negating, interferes with others<br>• Does not prioritise issues<br>• Low sense of right and wrong<br>• Not achievement focused<br>• Politically correct<br>• Impractical |

| Characteristics of the Yellow value orientation | |
|---|---|
| The Yellow valuing system is typically characterised by the following: | Those who reject the Yellow valuing system may perceive these characteristics as: |
| • Flexible and open<br>• Individualistic and responsible<br>• Seeks experience and depth<br>• Authenticity and freedom of choice<br>• Likes learning and self-improvement<br>• Focuses on pragmatic-functional ideas<br>• Aware of contextual requirements and varies personal approach<br>• Capitalises on awareness, wisdom and intuition<br>• Uses an integrative approach and systems thinking<br>• Looks at long-term, interactive effects<br>• Balances past-present-future considerations<br>• Low need for power, status, security<br>• Insight into emotional responses<br>• Change agent and innovative<br>• Facilitative leadership | • Uncommitted and uninvolved<br>• Simplistic and not always analytical<br>• Inconsistent and bringing instability<br>• Inactive and arrogant<br>• Critical, dissatisfied<br>• Low ambition and not status driven<br>• Unaware of immediate pressures, risks or threats<br>• Unfocused, abstract<br>• Flaunts knowledge or arrogant<br>• Low team orientation<br>• Materialistically unsuccessful<br>• Unimpressed and unimpressive |

| Characteristics of the Turquoise value orientation | |
|---|---|
| The Turquoise valuing system is typically characterised by the following: | Those who reject the Turquoise valuing system may perceive these characteristics as: |
| • Integration of physical and metaphysical dimensions<br>• Awareness of physical and social environment<br>• Transcendent consciousness<br>• Seeks to expand consciousness and impact on the collective unconscious<br>• Lives life in the present – open and aware to the environment<br>• Focus on diversity and abundance of life<br>• Spiritually inclined<br>• Existential-philosophical orientation<br>• Broad, abstract and transcendent goals<br>• Practical and simple lifestyle<br>• Intuitive / integrative interpretation of synchronicities and coincidences<br>• Aware of and applies energy principles<br>• Transcendental, thought leader, leads through example | • Ineffective within corporate context<br>• Otherworldly, esoteric, impractical<br>• Idealistic and unrealistic<br>• Materialistically unsuccessful<br>• Superstitious or out of touch<br>• Gullible or lacking insight<br>• Undiscerning, disconnected or dissociated<br>• Pushing subjective beliefs onto society<br>• Somewhat withdrawn from the goals of normal society |

## Specific Scoring details

The score key for a Values Orientation consists of items assigned a 1 or a 2, where 1 indicates a non-core item, and 2 a core-item.

By using the weight value of 2 as a 'signal' that it is a core item *(rather than it possessing any arithmetic properties)*, we can adjust the values of the remaining item scores on a colour *(assigned a weight of 1)* relative to the average magnitude of the core-items i.e. the weighting function applied to each non-core item is the proportion. The proportion of the core-item sumscores to the total possible core-item-sumscores:

$$coreprop(\phi) = \frac{core_item_sumscore}{total_possible_core_item_sumscore}$$

where

$f(\phi) =$ a logistic cumulative-function adjusted (scaled) proportion

$$scaled_coreprop = \left(1 + e^{\left(-1 \cdot \left(\frac{coreprop - a}{b}\right)\right)}\right)^{-1}$$

The final colour orientation sumscore is constructed from two sums, which is divided through by the number of items in total used to assess an orientation:

$$orientation_sumscore = core_item_sumscore + \sum_{i=1}^{n} f(\phi)(non_core_item)_i$$

$$N = \#of_core_items + \#of_non_core_items$$

$$Mean_orientation_score = \frac{orientation_sumscore}{N}$$

The *mean_orientation_scores* are used to form the Accepted and Rejected orientation-selections via a threshold algorithm (i.e. the highest valued orientation is chosen first, then the next selected whose magnitude is within a **10%** percentage discrepancy from the highest orientation value. Using this simple threshold rule:

- a maximum of **3** values orientations are selected for the Accepted Orientations,
- and **2** for the Rejected Orientations.

**Conflicting Orientations** are identified as those orientations selected as both Accepted and Rejected.

Two new Indices are computed from the *mean_orientation_scores,* **strength** and **separability**; where strength is an indication of the magnitude of the set of selected accepted or rejected values, and separability is an indication of the spread/variability of the entire sets of accepted or rejected values.

## The "inertial" Logistic Function

The calculations and graphics below show the values of the scaled proportion as a function of the original proportion value. The original proportion (coreprop) is varied between 0 and 1.0 in 10,000 increments of 0.0001. The *fs* values are the scaled equivalents.

The constants *a* and *b* are those used in the actual scoring algorithm. The straight black line is each coreprop value plotted against the corresponding coreprop value (the linear function). The blue line shows the logistic function *scaled_coreprop* values plotted against the original coreprop value.

$$coreprop := \text{for } i \in 0..10000 \;\; x_i \leftarrow \frac{i}{10000} \;\; x$$

$$a := .5 \qquad b := .05$$

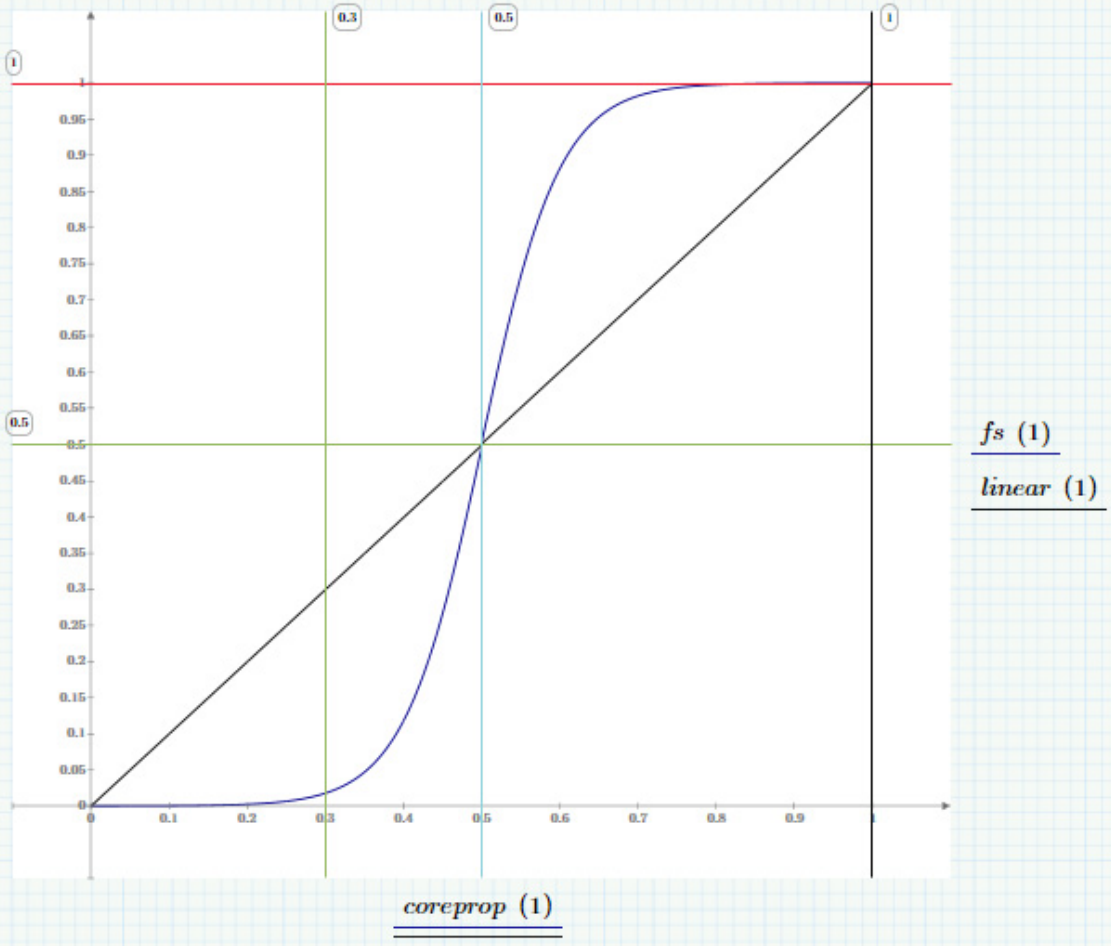
$$fs := \text{for } i \in 0..10000 \;\; fs_i \leftarrow \left(1 + e^{\left(-1 \cdot \frac{(coreprop_i - a)}{b}\right)}\right)^{-1} \;\; fs$$

$$linear := \text{for } i \in 0..10000 \;\; fm_i \leftarrow coreprop_i \;\; fm$$

$$coreprop_{5000} = 0.5 \qquad fs_{5000} = 0.5$$

$$coreprop_{4000} = 0.4 \qquad fs_{4000} = 0.11920292$$

$$coreprop_{6000} = 0.6 \qquad fs_{6000} = 0.88079708$$



# 4. Retest Reliability of the Orientation Sequences

## 4.1 Computing the reliability of ordered class sequences

Reliability here is defined by repeatability. That is, the extent to which a second assessment of values orientations and the accepted or rejected orientation sequence deviates from the first occasion results. If they are exactly the same, there is perfect reliability. In engineering terms, this direct assessment of reliability is referred to as repeatability. But, there is no known coefficient for indexing the agreement between ordered-class sequences, except that which indicates the exact agreement between orientation selections over occasions. However, as noted above in section 1.1, exact class-category agreement is somewhat unrealistic, as transitional boundaries between values orientations are more likely to be somewhat fuzzy rather than discrete. To allow for this, a conservative matching index was constructed which only took into account the proximity of the constituents of orientation sequences to one another, with a match recorded (or not) based upon the application of 8 rules to the two-occasion results. The overall match agreement was expressed as the percentage of cases assigned as 'matching' (100% would indicate all cases match across occasions, according to the matching 'rules').

### 4.1.1 The fuzzy-match comparison algorithm

❶ Find exact sequence matches, count these as a match.

❷ Where there is only one accepted orientation for the target and comparison orientation, but they don't match exactly: If they are adjacent colours, count as match.

❸ Where two of two target accepted orientations match two out of three in a comparison sequence, then count as a match.

❹ Where only one accepted orientation is in the target sequence, but there are two in the comparison sequence, and the target matches one of the pair in the comparison sequence: If the non-matching comparison is not an adjacent colour to the second 'matched' comparison, count as mismatch.

❺ Where there are two accepted orientations in target sequence, but just one in the comparison sequence, and the comparison matches one of the pair in the target sequence: If the non-matching target is not an adjacent colour to the second 'matched' target, count as mismatch.

❻ Where there are two accepted orientations in both target and comparison pairs, but only one of the pairs matches, then: if the difference between the spiral positions of the two non-matching orientations is > 1 (i.e. non-adjacent), count as mismatch.

❼ Where there are three accepted orientations in either the target and comparison pairs, but there is only one orientation match between them: count as mismatch.

❽ Where there are three accepted orientations in either the target and comparison pairs, there are two matches between two of them, then: If the non-matching comparison orientations are not an adjacent colour to each other, count as mismatch.

The criteria for mismatch were strict and did not employ semantic rules; but according to the VO theory, the "higher" level worldviews largely dominate the lower level perceptions - except in stressful situations. Very often some of the lower level worldviews emerge because of stressful situations but these are not the dominant value systems of the person. People also tend to grow to the next higher level – either from Individualistic e.g. Red to group-oriented e.g. Blue; or from Individualistic e.g. Red to Individualistic e.g. Orange. When exposed to trauma, the worldview usually temporarily drops into a more defensive and fear driven orientation.