



## **Transformational Leadership and Value System Congruence**

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**Abstract.** This study looked at the relationship between transformational leadership and three types of value system congruence – leader-organization congruence, leader-follower congruence, and follower-organization congruence, separately for terminal and instrumental values. Findings indicate that follower's terminal value system congruence with leader is positively related to transformational leadership, and this relationship remains significant even after controlling for leader-organization or follower-organization terminal value system congruence. Leader-organization congruence does not also moderate the relationship between transformational leadership and leader-follower congruence, in the case of both terminal and instrumental values. Leader-organization instrumental value system congruence is positively related to leader-follower instrumental value system congruence. No relationship is seen between transformational leadership and follower-organization congruence in the case of both terminal and instrumental values. Leader-follower congruence does not mediate the relationship between transformational leadership and follower-organization congruence.

**Keywords:** congruence, leadership, transformational, values

### **1. Model overview**

Burns (1978) considered transformational leadership to be a relationship wherein leaders and followers raise one another to higher levels of motivation. Their purposes, which might have started out as separate but related, become fused, leading to greater leader-follower congruence in value hierarchies. Thus, value system congruence between leader and follower is among the most important characteristics of transformational leadership. Organizations would however be more interested in knowing if transformational leadership also leads to greater congruence in value systems between employees and the organization. The extent to which leaders' value systems are congruent with the organization's would also affect the congruence of follower with leader and organization. This paper is an attempt to look at the relationship between transformational leadership and three types of value system congruence, i.e., leader-follower, follower-organization, and leader-organization value system congruence.

Burns (1978) defined leadership as a relationship that induces followers to pursue common or at least joint purposes that represent the values and motivations of both leaders and followers. Addressing the values of both leaders

and followers could be handled in two ways based on the nature of leader-follower interactions. Burns termed the first one as transactional leadership and the second as transforming or transformational leadership. Transactional leadership involves an exchange of benefits and is based on current values and motivations of both leaders and followers. Transformational leadership on the other hand, does not take the current values and motivations to be fixed, but rather seeks to change them.

### 1.1. *Transformational leadership*

According to Burns (1978), transformational leadership occurs when leaders and followers raise one another to higher levels of values and motivations, and results in a transforming effect on both leaders and followers. The purposes of leaders and followers that might have started out as separate but related, as in the case of transactional leadership, become fused. Transactional leaders take the values, needs, motivations and purposes of followers as given and unchanging, but transformational leaders do not.

Bass (1985) defined a transformational leader as one who motivates followers to do more than they originally expected to do. Transformational leaders broaden and change the interests of their followers, and generate awareness and acceptance of the purposes and mission of the group. They stir their followers to look beyond their self-interest for the good of the group. Bass (1985) found that transformational leadership consisted of four factors – charismatic leadership or idealized influence, inspirational leadership or motivation, intellectual stimulation, and individualized consideration. Followers have complete faith in charismatic leaders, feel proud to be associated with them, and trust their capacity to overcome any obstacle. Inspirational leadership involves the arousal and heightening of motivation among followers. Intellectual stimulation arouses in followers the awareness of problems and how they may be solved, and stirs the imagination and generates thoughts and insights. Individualized consideration involves giving personal attention to followers who seem neglected, treating each follower individually, and helping each follower get what he or she wants (Bass, 1998).

Superior performance is possible only by transforming followers' values, attitudes and motives from a lower to a higher plane of arousal and maturity (Bass, 1985). Studies have found significant and positive relationships between transformational leadership and the amount of effort followers are willing to exert, satisfaction with the leader, ratings of job performance, and perceived effectiveness (Hater and Bass, 1988; Howell and Avolio, 1993; Ross and Offermann, 1997). Transformational leaders were judged to have better relations with higher-ups and to make more of a contribution to the organization than were those who were described only as trans-

actional. Transformational leadership contributes significantly to effective organizational policies and performance (Bass, 1998). The transformational leadership model adds to initiation and consideration in explaining the variance of subordinates' satisfaction and ratings of leader effectiveness (Seltzer and Bass, 1990).

Leadership is a relationship between leaders and followers, and building this relationship requires an appreciation for the personal values of those who would be willing to give their energy and talents to accomplish shared objectives. Values form the very core of personality, and they influence the choices people make, the appeals they respond to, and the way they invest their time and energy (Posner and Schmidt, 1992). Values assume even more importance in the case of transformational leaders, since transformational leadership results in changing the needs and values of both leaders and followers.

### 1.2. *Value system congruence*

Rokeach (1973) defined a value as 'an enduring 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.' A belief concerning a desirable mode of conduct was called an instrumental value and a belief concerning a desirable end-state of existence was called a terminal value. Allport, Vernon and Lindzey (1960) considered a value to be a belief upon which human beings act by preference. In this vein, values may be thought of as internalized normative beliefs that can guide behavior. If a person values freedom as an end-state of existence, it means that he or she believes that freedom is preferable to slavery.

Values are enduring and it is important to understand values because values make a difference in terms of how people feel about themselves and their work (Rokeach and Ball-Rokeach, 1989). Several studies have demonstrated empirically how values affect personal and organizational effectiveness (Meglino, Ravlin and Adkins, 1989; O'Reilly, Chatman and Caldwell, 1991). Values can be conceptualized in two distinct ways – ipsative and non-ipsative. The ipsative design looks upon values as being hierarchical in nature, leading to the idea of a value system. Rokeach (1973, p. 5) defined a value system as 'an enduring organization of beliefs concerning preferable modes of conduct or end-states of existence along a continuum of relative importance.' A set of rank-ordered values is called a value system. The second conceptualization of values does not necessarily look at values as hierarchically organized. It allows for variance in the importance of individual values, and in the importance of the full array of values held or the total importance of values to a person (Kabanoff and Holt, 1996; Kabanoff, Waldersee and Cohen, 1995; Ravlin and Meglino, 1987).

Social values are phenomena that are highly socially desirable and tend to be strongly endorsed by all individuals. Simply recording the different things human beings value may not mean much, for that might not convey anything special about a particular individual; several individuals might have the same set of values. The relative importance of the different values – or the value systems – might however differ. That a person values happiness does not say much that is unique about that person, for most human beings value happiness. What matters most is how much a person values happiness in comparison with the other things that he or she values. If one knows that a person values happiness more than self-respect, one can have a more accurate picture of that person. It is only the ipsative (rank-ordering) measurement model that can capture the unique value configuration of an individual (Ravlin and Meglino, 1987).

Value system congruence between leader and follower could be defined as the extent of agreement between the leader's value system and the follower's value system. Value congruence between employees and their supervisors has been found to be significantly related to employee satisfaction and commitment (Meglino et al., 1989). Posner (1992) found that perceived value congruence was directly related to positive work attitudes. Weiss (1978) found that people aligned their values with the values of their leader if they perceived their leader to be competent and successful. Value congruence indicates a harmonious relationship between leader and subordinate, and should therefore result in greater satisfaction over time. Value congruence also indicates a strong identification of the subordinate with the leader.

Organizational values exist when the members of an organization share values (Wiener, 1988). Even though all members of an organization may not have the same values, a majority of active members would agree on them. Value system congruence between an individual and the organization could be defined as the extent of agreement between the person's value system and the organization's value system. Value congruence between employees and their organization has been found to indicate overall happiness and satisfaction with the organization (Feather, 1979). Socialization is the process through which an individual comes to understand the norms and values of an organization. The objective of socialization is to ensure that the value systems of individuals are in line with the value systems of the organization. Weak value system congruence between an organization and its member could result in either the member's value system changing and becoming more similar to the organization's, or the organization's value system being changed, or the member leaving the organization (Chatman, 1989).

### 1.3. *Leadership and value system congruence*

#### 1.3.1. *Leader-follower value system congruence*

Burns (1978) held that transformational leadership is based on the role of conscious purpose drawn from values. Transformational leadership involves the uncovering of contradictions among values and between values and practice, and the realigning of values in followers. Congruence between the value hierarchies of leaders and followers would produce a powerful potential for the exercise of purposeful leadership. The leader has an important role to play in transmitting values (Kouzes and Posner, 1995). The followers of transformational leaders experience a total and unqualified belief in and identification with the leaders and their mission. This identification would result in similarity of value systems between the transformational leaders and their followers since values are an important component of such identification. Transformational leadership focuses on the joint purposes of leader and follower, and often results in transforming those purposes. Only terminal values pertain to end-states of existence, and so the leadership that focuses on purposes will be related only to terminal values. Moreover, since the identification is total and unqualified, it would not depend on the extent to which the leader's or the follower's value system is congruent to the organization's value system. Therefore, I have

*Hypothesis 1:* Transformational leadership will be positively related to terminal value system congruence between leader and follower.

*Hypothesis 2:* Transformational leadership will be positively related to terminal value system congruence between leader and follower irrespective of leader-organization terminal value system congruence and follower-organization terminal value system congruence.

#### 1.3.2. *Leader-organization value system congruence*

When leaders have instrumental value systems similar to the organization's, their followers are likely to feel more confident about achieving the leaders' vision. They will be more inspired when leaders match the organizational environment concerning means to be used for achieving goals than when it is otherwise. The goals of leaders will appear more realistic and achievable when leaders and the organization assign relative priorities to means in similar ways. Leaders whose instrumental value systems match the organization's will be seen as being more inspirational. This perception concerning inspirational leadership will also not depend on the extent to which followers' instrumental value systems match their leaders' or their organization's.

*Hypothesis 3:* Inspirational leadership will be positively related to instrumental value system congruence between leader and organization.

*Hypothesis 4:* Inspirational leadership will be positively related to instrumental value system congruence between leader and organization irrespective of leader-follower instrumental value system congruence and follower-organization instrumental value system congruence.

The extent of identification of followers with leaders would also depend on the extent to which leaders fit into the culture of the organization. Followers are likely to start emulating the values systems of their leaders if those are also in line with the value systems of the organization. Value system congruence with leader will be greater if the leader's value system is congruent with the organization's. Moreover, the impact of transformational leadership on leader-follower value system congruence will be higher if the value system congruence between leader and organization is high. Hence:

*Hypothesis 5:* Leader-organization value system congruence will be positively related to leader-follower value system congruence.

*Hypothesis 6:* Leader-organization value system congruence will moderate the relationship between transformational leadership and leader-follower value system congruence.

### 1.3.3. *Follower-organization value system congruence*

Transformational leaders relate the mission of their organization to the strongly held values that are part of their organization's culture. The extent of identification of followers with the transformational leaders, or the extent to which their value systems are congruent with those of the leaders, would influence the ease with which the vision of the transformational leader can be shared by the followers. The more the followers identify themselves with their leader, the easier will it be for them to see the relevance of organizational values in fulfilling the mission of the organization as highlighted by the leader. Transformational leadership has a dyadic rather than a group effect on subordinates (Seltzer and Bass, 1990). It is the dyadic relationship between transformational leader and follower that results in converting followers into leaders (Burns, 1978). Therefore, any change in follower-organization value system congruence can only be a result of this dyadic relationship.

*Hypothesis 7:* Leader-follower value system congruence will be positively related to follower-organization value system congruence.

*Hypothesis 8:* Leader-follower value system congruence will mediate the

relationship between transformational leadership and follower-organization value system congruence.

## 2. Methods

I collected data for this study from a large, non-profit, national, human services organization in the United States. Blood services (collecting and distributing blood and blood products to hospitals) comprise a major portion of the organization's domain of activity. Disaster relief, health services and armed forces services are the most important areas of operation after blood services. The organization has a total staff strength of 28,000, and operates on a \$1.5 million annual budget.

### 2.1. *Sample characteristics*

Those whom I surveyed belonged to one of the 46 regional blood centers, spanning two northeastern states. Some of the respondents were handed over the surveys in person, generally at the beginning of routine departmental meetings, by an administrative official of the organization, and were requested to answer the surveys and return them immediately. Other respondents were sent the surveys through inter-departmental mail and completed surveys were returned through the same medium to the administrative official. All responses were anonymous, and this was made clear to every respondent.

#### 2.1.1. *Sample of leaders and followers*

My sample of 100 leaders was drawn from nurse managers. The leaders were randomly chosen and were requested to fill in the Value Survey (Rokeach, 1973) to measure their value systems. A majority of leaders surveyed had been with the organization for at least 7 years. The median age of the leaders surveyed was 42 years. Of the 96 respondents who mentioned their gender, 71 were female and 25 were male. A subordinate of each of the leaders surveyed was then randomly chosen to answer the Value Survey (Rokeach, 1973) and the leadership questionnaire. An average leader had 10 subordinates from whom 1 subordinate was randomly chosen. Of the 99 subordinates who mentioned their gender, 73 were female and 26 were male. A majority of subordinates surveyed were at least 30 years old, and had been with the organization for at least 4 years. 78% of the respondents reported that they had been working with the leader they were rating, for not less than 1 year.

### 2.1.2. *Sample surveyed for organizational values*

To measure organization's value system, I surveyed a cross-section of people who had been members of the organization for at least 2 years. It was ensured that the leaders and subordinates who answered the survey earlier were not again asked to record the value system of the organization. Out of the 101 members of the organization who were randomly chosen, 86 members had an organizational tenure of at least 2 years. Only these 86 responses were used to arrive at the organization's value system. Of these 86 respondents, 64 were female and 22 were male. A majority of the respondents were at least 40 years old, and had been with the organization for more than 5 years.

## 2.2. *Measures*

I used Rokeach's (1973) Value Survey for measuring the value systems of leaders, subordinates, and the organization. Rokeach's Survey is the most commonly used instrument that is capable of accommodating all possible social values (Sikula and Costa, 1994). The Value Survey has been found to be both reliable and valid (Homer and Kahle, 1988; Rokeach, 1973; Schwartz and Bilsky, 1990; Schwartz and Inbar-Saban, 1988). The Survey uses an ipsative (rank order) design and has two lists of values arranged alphabetically – the first list consisting of 18 terminal values and the second list consisting of 18 instrumental values. Each value is presented along with a brief definition in parenthesis and respondents are asked to arrange the values in each set in order of importance to and as guiding principles in their life. The value systems were thus obtained for each leader, for one subordinate of each leader, and for the organization as consisting of two components – one terminal value system and one instrumental value system. For measuring the organization's value system, 86 members of the organization were asked to arrange the same two sets of values, but in order of importance to and as guiding principles for their organization.

### 2.2.1. *Organization's value system*

If organizational values are not highly crystallized (widely shared within the organization), the organizational profile will not be reliable. I followed the procedure used by Chatman (1991) and assessed crystallization through Cronbach's coefficient alpha. The Cronbach's alpha was 0.94 in the case of terminal value rankings, and 0.93 in the case of instrumental value rankings. These compare favorably with the alphas ranging from 0.84 to 0.90 obtained by Chatman for eight organizations. Frequency distributions of rankings obtained for each of the 18 terminal values and 18 instrumental values were calculated. For each value, the frequency distribution of ranks was arranged in order of increasing ranks. The midpoint in the distribution for each value

was calculated, and the midpoints for each set of 18 values were arranged in ascending order to obtain the composite rank order (Rokeach, 1973). The composite rank order thus obtained for the set of 18 terminal values was taken as the organization's terminal value system, and the composite rank order obtained for the set of 18 instrumental values was taken as the organization's instrumental value system.

### 2.2.2. *Value system congruence*

The correlation between the rank ordering obtained from a person and the composite rank order of the organization was taken as the index of congruence between the value systems of the individual and the organization (Meglino et al., 1989; Rokeach, 1973). For each individual-organization pair, I obtained two scores for the index of congruence – an index of terminal value system congruence and an index of instrumental value system congruence. The leader-follower value system congruence was calculated in the same way in which the leader-organization or follower-organization value system congruence was calculated. Instead of a common rank order of 18 values for the organization, I had a different rank order for each leader and follower. The correlation between a follower's rank order and his or her leader's rank order was taken as the index of leader-follower value system congruence for that leader-follower pair. This again was calculated separately for instrumental and terminal values.

### 2.2.3. *Transformational leadership*

The Multifactor Leadership Questionnaire (MLQ) was developed to measure the factors in transactional and transformational leadership (Bass, 1985). Several studies (Bycio, Hackett and Allen, 1995; Hartog, Muijen and Koopman, 1997; Hater and Bass, 1988; Howell and Avolio, 1993; Keller, 1992) have revealed high validity for the MLQ. The relationship of high transformational leadership scores on MLQ with effective leadership was found to be significant across many settings (Bass, 1998). I used the MLQ Form 5x of Bass and Avolio (1991) to measure transformational leadership. The Questionnaire has 37 items to measure the four factors of transformational leadership – 8 items for attributed charisma, 10 items each for inspirational leadership and intellectual stimulation, and 9 items for individualized consideration. Subordinates were requested to answer the MLQ by rating how frequently their current immediate supervisors have displayed the behaviors described, using a five-point scale (0 = Not at all; 1 = Once in a while; 2 = Sometimes; 3 = Fairly often; 4 = Frequently if not always). A separate score for each of the four factors of transformational leadership was obtained. The Cronbach's Alpha for items within each factor group was at least 0.9. The mean of the items in each factor group was taken as the measure of that factor. Although

the four components of transformational leadership are conceptually different and form independent clusters of items, they are correlated. Correlations of 0.75 or above have been reported in several studies (Bycio et al., 1995; Howell and Avolio, 1993).

### 3. Results

The correlations between variables are included in Table 1. Each of the four factors of transformational leadership was found to be significantly positively related to leader-follower terminal value system congruence, thereby supporting Hypothesis 1. Inspirational leadership, intellectual stimulation, and individualized consideration continued to be significantly ( $p < 0.05$ ) positively related to leader-follower terminal value system congruence even after controlling for leader-organization or follower-organization terminal value system congruence. Attributed charisma was only moderately ( $p < 0.10$ ) positively related to leader-follower terminal value system congruence after controlling for leader-organization or follower-organization terminal value system congruence. This supports Hypothesis 2, though only at 0.10 level of significance in the case of attributed charisma.

Inspirational leadership was moderately ( $p < 0.10$ ) positively related to leader-organization instrumental value system congruence. Hypothesis 3 was thus supported only at 0.10 level of significance. A similar moderately ( $p < 0.10$ ) positive relationship was also seen between intellectual stimulation and leader-organization instrumental value system congruence. Inspirational leadership continued to be moderately ( $p < 0.10$ ) positively related to leader-organization instrumental value system congruence even after controlling for leader-follower or follower-organization instrumental value system congruence. This supports Hypothesis 4, but again only at 0.10 level of significance. Intellectual stimulation also continued to be moderately ( $p < 0.10$ ) positively related to leader-organization instrumental value system congruence even after controlling for leader-follower or follower-organization instrumental value system congruence.

Leader-organization terminal value system congruence was moderately ( $p < 0.10$ ) positively related to leader-follower terminal value system congruence. Leader-organization instrumental value system congruence was significantly ( $p < 0.05$ ) positively related to leader-follower instrumental value system congruence. Thus, Hypothesis 5 was supported, with the level of significance being only 0.10 in the case of terminal values. I tested Hypothesis 6 through a regression analysis with leader-follower congruence as the dependent variable. Transformational factor was entered in the first step of the regression equation as the independent variable, followed by

Table 1. Correlations between variables.<sup>a</sup>

(N ranges from 94 to 100)	M	S.D.	1	2	3	4	5	6	7	8	9	10
1. Attributed charisma	2.64	0.97	(0.91)									
2. Inspirational leadership	2.68	0.87	0.88 <sup>e</sup>	(0.93)								
3. Intellectual stimulation	2.49	0.96	0.86 <sup>e</sup>	0.88 <sup>e</sup>	(0.94)							
4. Individualized consideration	2.52	0.99	0.88 <sup>e</sup>	0.85 <sup>e</sup>	0.89 <sup>e</sup>	(0.94)						
5. Leader-follower TVSC	0.19	0.29	0.21 <sup>c</sup>	0.26 <sup>c</sup>	0.25 <sup>c</sup>	0.24 <sup>c</sup>						
6. Leader-follower IVSC	0.17	0.28	0.10	0.06	0.01	0.06	0.06					
7. Follower-organization TVSC	0.27	0.27	0.13	0.12	0.06	0.09	0.18 <sup>b</sup>	0.17				
8. Follower-organization IVSC	0.35	0.22	-0.11	-0.05	-0.13	-0.13	0.15	0.20 <sup>b</sup>	0.45 <sup>e</sup>			
9. Leader-organization TVSC	0.26	0.29	0.12	0.12	0.05	0.08	0.19 <sup>b</sup>	0.21 <sup>c</sup>	0.06	0.05		
10. Leader-organization IVSC	0.31	0.24	0.15	0.19 <sup>b</sup>	0.19 <sup>b</sup>	0.16	-0.02	0.24 <sup>c</sup>	0.01	0.01	0.34 <sup>d</sup>	

<sup>a</sup> Alphas are in parentheses along the diagonal. TVSC = Terminal Value System Congruence. IVSC = Instrumental Value System Congruence.

<sup>b</sup>  $p < 0.10$ .

<sup>c</sup>  $p < 0.05$ .

<sup>d</sup>  $p < 0.01$ .

<sup>e</sup>  $p < 0.001$ .

leader-organization congruence in the second step, and the product of transformational factor and leader-organization congruence in the third step. Eight separate analyses were done to test for each of the four transformational factors with respect to both terminal and instrumental values. Significant additional variance was not explained in the third step of the regression equation in all the eight cases. Leader-organization congruence did not moderate the relationship between transformational leadership and leader-follower congruence. Hypothesis 6 was hence not supported.

Turning to Hypothesis 7, leader-follower value system congruence and follower-organization value system congruence were only moderately ( $p < 0.10$ ) positively related to each other in the case of both terminal and instrumental values. Thus, Hypothesis 7 obtained support only at 0.10 level of significance. When I controlled for leader-organization congruence, the moderately ( $p < 0.10$ ) positive relationship between leader-follower congruence and follower organization congruence ceased to exist in the case of terminal values and continued to exist in the case of instrumental values. To test Hypothesis 8, I looked at the partial correlation between each transformational leadership factor and follower-organization congruence while controlling for leader-follower congruence. Controlling for leader-follower congruence did not change the relationship between transformational leadership and follower-organization congruence in the case of both terminal and instrumental values. The relationship between transformational leadership and follower-organization congruence was therefore not mediated by leader-follower congruence. Thus, the results did not lend support to Hypothesis 8.

#### 4. Discussion

Emulation of leader's value system by followers was a component of House's (1977) model of charismatic leadership. The findings of this study confirm that followers emulate only the terminal value systems of transformational leaders, but not their instrumental value systems. Bass (1985) argued that transformational leaders elevated the value of designated outcomes in the eyes of the followers resulting in what Burns (1978) termed the fusion of leader's and followers' purposes. One of the managerial implications of this study is that one should pay attention to terminal values of subordinates if a change is contemplated. It is also to be noted that the relationship between transformational leadership and leader-follower terminal value system congruence remains significant even after controlling for leader-organization terminal value system congruence. Subordinates whose terminal value systems match their leader's are likely to see that leader as more transformational

irrespective of whether the leader's terminal value system is congruent with the organization's or not. Leader-organization congruence does not even have any moderating effect.

The relationship between leader-follower value system congruence and follower-organization value system congruence is affected by the extent to which the leader's value system is congruent with that of the organization, but only in the case of terminal values. It is interesting to note that leader-follower congruence and leader-organization congruence are positively related in the case of instrumental values, even after removing the effects of leader-organization congruence. Followers tend to agree with leaders whose relative priority concerning various means matches that of the organization, but this does not lead to greater congruence between follower and organization.

An important finding of this study is that transformational leadership does not lead to greater fit between the follower and the organization. Identification with transformational leaders as a mechanism of value acquisition and maintenance (Wiener, 1988) results in followers changing their terminal values to be in tune with those of their leaders but not in tune with those of their organization. The results of this study support the conclusion of Seltzer and Bass (1990) that transformational leadership has a dyadic rather than a group effect on followers. The results also indicate that the dyadic or one-to-one relationship between transformational leader and follower does not affect the relationship between the follower and the organization.

## **5. Conclusion**

The complex environments that business organizations face today and the rapid change that has become a part of life for many organizations highlight the importance of transformational leadership for effective management of organizations. This study addresses the relationship between transformational leadership and value system congruence of leader and follower with one another and with the organization. This study is also unique in that it addresses three distinct types of value system congruence – leader-organization, leader-follower, and follower-organization. This study provides initial support for a complex relationship between transformational leadership and value system congruence. As further research provides greater support, developing greater value system congruence could be used as a supplement to transformational leadership to handle the changing corporate environment effectively.

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