



Values Mapping Tool for Projects¹

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1 Purpose of this tool

If you're like most people working in international development, you are a **stakeholder**. You believe that what you do as a development practitioner, in collaboration with other stakeholders, ought to make a positive difference for someone in need, somewhere. This improvement to such people's **wellbeing** might depend on the combined actions of stakeholders to help facilitate a more positive enabling environment that aligns with principles of universal, equal human **dignity**. Your project might help such people to get a decent job and feed their family or to stay safe and healthy, among other outcomes. At some level—e.g., in access to fair and impartial standards of **justice** in the application of local laws, regulations, and procedural determinations made during the design and implementation of your project—your project becomes a manifestation of that justice (or a marker on the way to a society characterized by higher standards of justice). Finally, as an element in an international development program or policy, your project reflects the sense of **care** and concern for such people that leads to projects like yours being possible. Other (priority) values of

Why map values?

Projects have various stakeholders. Each stakeholder is motivated to think and act by the values that they hold. This tool will help to make those values explicit and understandable, which in turn will offer resources to avoid or mitigate conflicts, and to build the type of solidarity and shared vision that will strengthen positive impact and help to sustain a project well into the future.

In projects funded by USAID, this tool fits most accurately within the Collaborating, Learning, and Adapting (CLA) framework.

¹ Two additional Values Mapping Tools are available for multi-year strategic planning within organizations or firms, and for advocacy initiatives. A fourth Values Mapping Tool for humanitarian response situations is being developed.

your project’s stakeholders will also be made explicit – and hopefully celebrated – in both the **means** used to achieve your project, and in the **end results** of your project.

There is a broad consensus among international development practitioners like you that projects require clarity about what each stakeholder’s actions are intended to accomplish. Ideally, this will be found in a project’s theory of change and/or results framework.

Much less obvious but equally important is the awareness that you and your project are being asked to navigate the complex moral landscape of values, needs, aspirations, identities, norms, traditions, beliefs, and motivations of various project stakeholders including the population that the project intends to affect positively, both directly and indirectly. That landscape is filled with moral values: some of which conflict, and others that are of lesser importance. Successfully traveling across that moral landscape requires that you understand the meaning, significance, and role of such values (and value-related dilemmas and conflicts) so that you come to know why and how certain moral principles influence stakeholders in their decision-making and in their taking (or avoiding) certain actions.²

The baseline assumption is that project decisions are not made solely based on efficiency and effectiveness (which, in any event, are just means to an end); they are also motivationally driven (or ought to be) by many values and principles that people care about that define the results that ought to be achieved and sustained.

Differences driven by values almost inevitably arise among project stakeholders, of varying power, knowledge, and influence. Understanding the values held by such stakeholders will help you and your project team and stakeholders work through the diverging value-driven motivations, seek to balance or shift the power dynamics in fair and deliberative ways, so that your project is not derailed by ensuing discord and unnecessary conflict. In this way, **pragmatic applied ethics involves developing values-based project management competencies,**

Who should use this Tool?

This tool was designed to support **project management staff** to understand and map the values of project stakeholders in the context of a specific project. It can also be used, with appropriate project-specific indicators (see Appendix) by **monitoring, evaluation, and learning (MEL) staff** to track the impact of values over time as drivers in project outputs and outcomes, but it is usually used within the **Collaboration, Learning and Adapting (CLA)** approach..

This project-based evaluative work is essential to defining, refining, and reaching the project’s goals in a meaningful way, through morally sound means, while simultaneously avoiding harmful consequences and abiding by the “do no harm” maxim.

² It is acknowledged at the outset that some of the terms, commonly used in the field of applied development ethics and used in this Tool, will be unfamiliar to many readers. The training offered to master this Tool will familiarize the intended users in the vocabulary and key concepts of applied ethics, and some explanations and guidance will also be found in the Appendix.

motivation, and decision-making on actions that must be integrated into daily operations in ways that are morally defensible, non-arbitrary, and meaningful.

The training that goes with this tool will help you to:

- Become better grounded in basic applied ethics³ and its role in your project’s means and ends;
- Identify, understand, and define key (i.e., the most significant) moral values held by people (stakeholders and stakeholder institutions) in your project, in terms of stakeholder identity and stakeholder action, and differentiate such values by the role that they play (e.g., means versus ends);
- Use the guidance in this tool to understand the moral values of all project-related stakeholders, and where such values converge or where they come into conflict;
- Tailor a survey or use similar research instruments (key informant interviews, focus group discussions, workshops) to assess stakeholder moral values and create a baseline of their values in terms of their identity. Once this baseline is established, it will be possible to build profiles of the moral identity of each of the recognized and significant stakeholder groups (*Hint*: they may be different than who you think they are!);
- If required and appropriate to achieve common ground and agree on necessary trade-offs, convene and facilitate a “whole system in the room” (WSR)⁴ multi-day workshop to develop a shared **project vision statement** that all stakeholders will participate in formulating, and through facilitated deliberation come to agreement on that vision that is as definitive as possible while still remaining pragmatically short;
- Assess which stakeholder moral values and associated attitudes need to change in the “means” (methods, processes, activities) intended to accomplish the shared goals in the vision statement (i.e., what needs to change?) and the outcomes (ends) being sought; and
- Identify actions the project can take to facilitate the needed change(s) in both means and ends of projects.

What is a Key Stakeholder Group?
While a project may have many stakeholders, those who have the most direct connection with the means and the ends (outcomes) associated with the project, and hence the greatest justification for some participation in the creation and implementation of the project, are **key** stakeholders.

³ “Applied ethics” consists of ethical principles within a specified context that offer guidance to decision-makers. Such ethical principles are derived from one or more moral values. Often within humanitarian response and international development, “ethics” has come to mean compliance with legal and procedural regulations. While that form of ethical compliance has an important role, that is not what is covered in this values mapping tool.

⁴ As described by USAID’s Toolbox of Empowerment: “Whole System in the Room (WSR) is an approach that brings together representatives of as many different stakeholder groups as possible, often in an intensive workshop, to strengthen relationships, to learn from each other’s perspectives, to build consensus and identify solutions to development problems they are facing and commit to collective action. WSR helps ensure that diverse perspectives are incorporated into development efforts and that the voices of those affected by a development issue are included.” https://usaidlearninglab.org/sites/default/files/2022-05/cheat_sheets_of_tools_and_methods_for_local_knowledge_0.pdf

You will gain competence in these areas through an iterative process of applied ethics awareness raising, training, and mentoring throughout an analysis of project documents and participatory data collection and analysis. The Center hopes that **in elevating the moral content of values-based motivation and ethical concerns, and in making this content explicit through values mapping, your project team and the project's stakeholders will benefit from improved self-awareness and engage in regular, pragmatic moral and ethical discourse about the means and ends that they seek.** This discourse would, in time, generate the project's ability to discern moral and ethical issues and opportunities, and to find ways to make the project's work as effective, meaningful, and norm-setting as possible.

2 Introduction to the moral context of a project

2.1 Significance of moral values

Values motivate, direct, and sustain action and guide in the allocation of scarce resources. While traditional cost-benefit and political-economy analyses offer important empirical justifications for humanitarian response and international development policies and programming, the direct and highly motivational human connection is challenging to convey through the contours of regression analysis or quantitative data alone. Those involved in advocacy for international relief and development know this all too well.

Through better understanding of the nature and role of moral values – some of which are universal and others of which are relative to certain cultural or religious beliefs – we come to view the world more clearly through a moral lens. We learn how such values (1) build our identity; (2) guide our various purposes, strategies, and decisions; and (3) offer a very motivational sense of meaning to the work that we do.

Values mapping is also sufficiently versatile to enable robust moral analysis based on other moral frameworks. Most of us are already familiar with human rights, but fewer people may know that there are many other moral frameworks⁵ that also allow for very insightful assessment and analysis of the methods applied and the results achieved in humanitarian response and in international development. One or more of such analytical frameworks can be applied, depending on the situation.

Isn't it just about human rights?

Values mapping is a methodological approach that helps to identify and make relevant moral values explicit, understandable, measurable, and accessible as a motivating resource.

In so doing, we are empowered to give serious thought to foundational moral principles and what it will take to meet threshold conditions to satisfy the demands of such moral values, including but not limited to human rights.

⁵ e.g., the capabilities approach, ethics of care, virtue ethics, deontological ethics, consequentialist ethics, and others.

The methodological application of values mapping is largely determined by the intended goal. Values, as they relate to humanitarian response and international development, are associated with individuals and groups as stakeholders who either support or who stand in the way of change.

There are three main steps involved in values mapping:

- A. **Awareness-raising** of the existence and significance of moral parameters, and then around the moral implications of any proposed changes or strategies leading to changes in the status quo.⁶ This may include a baseline assessment and the prioritization of moral values that most closely link with a project’s purpose, and with the identities and priorities of the practitioners who are implementing the project.

- B. **Stakeholder deliberations** involving the practitioners and the other main stakeholders who are most likely to be affected by, or have a role in, the project. These deliberations are structured around a Mephram Values Matrix, as illustrated below. This type of matrix separates moral considerations (along the x axis) between **primary moral values (well-being, dignity, justice, and care) that apply to every project** and, where relevant, **other priority moral values** (as selected and agreed upon by the various stakeholders). The matrix then separates the perspectives of the primary stakeholders (on the y axis). This type of matrix allows all participants to begin thinking – both separately and together – about how moral values “show up” in projects, and what the anticipated impact and consequences of the project are likely to be. Each open white box represents the areas in which facilitated deliberations between the stakeholders will be focused.

Mephram Ethics Matrix⁷

Stakeholders	Wellbeing	Dignity	Justice	Care	Priority Value 1	Priority Value 2	Priority Value 3
Practitioners							
Civil society							
Local Gov’t							
Nat’l Gov’t							
USAID							

⁶ These changes can range from the general to the specific, e.g., from an organization creating a new multi-year strategy for its own operations, programming, and advocacy, to very particular goals across international relief and development associated with operations, programming, and advocacy.

⁷ This matrix approach was originally developed by Prof. Ben Mephram, Director of the Centre for Applied Bioethics at the University of Nottingham, UK, to analyze the impacts in agriculture of new technologies, but it has much wider applications. See <https://www.foodethicscouncil.org/insights/ethical-matrix/>

- C. **Linking Values to Performance** requires a stakeholder consensus on all the identified moral values (primary and priority) and ranking of values. The ranking supports the design of monitoring, evaluation, and learning (MEL) activities and the collaborating, learning, and adjusting (CLA) approach to **measure the alignment of the project**—in its design and implementation, and in the project’s results and impacts—to these values.

2.2 Using values mapping for projects

Quality versus costs: Similarly, when procuring the services of those who design, implement, supervise, and evaluate development projects, decisions must be made that relate to the quality of the services being offered relative to the price. Should the lowest cost always prevail, or are there moral grounds that can be persuasively offered to justify paying more for higher quality? Values mapping allows for the defense of higher quality means and ends, when warranted.

Means and ends: Values mapping differentiates between moral values that are exceptionally important in their own right as development goals (or “ends”), and those values that are instrumentally valuable (as “means”) to achieving such project goals. In applied ethics, both means and ends are deserving of careful and equal scrutiny in their own contexts and in the roles that they play, and both must be morally defensible on rational grounds. For all stakeholders to be able to speak to both the means and ends of development projects with clear conviction and persuasiveness helps to build local ownership of the project. For example, a project that keeps costs low by sacrificing safety standards during implementation, to get the least expensive outcome at the completion of the project, is likely to be putting human life and wellbeing (and possibly also environmental considerations) at jeopardy as a tradeoff – in other words, a particular “means” of achieving a project’s goals which fails to align with the primary values of stakeholders.

Basic needs: Most development projects respond to the basic development needs of the stakeholders served, which obviously require priority attention, but should their larger development aspirations simply be ignored? Values mapping allows for decision-makers to consider and make a morally defensible case for who gets to decide which needs are “basic”, and how the inevitable tradeoffs were thought through. Values mapping shows us how we can connect with, recognize, and respect human dignity of these stakeholders by engaging in a meaningful way with our consideration of development needs and development aspirations.

The reality of scarcity

Resources for development are always scarce. This requires tough choices and often hard trade-offs, as well as the ability to respond to thoughtful challenges to why such resources are in fact so meager.

Values mapping helps to identify, among key stakeholder groups, what shared moral values best serve to identify and justify choices and trade-offs in how scarce resources are allocated, whether more widely available resources can be used as alternatives, and how wastage, bribes, or theft are best controlled for during the implementation of a project.

Values mapping also enables stakeholders to take a longer view that honors a wider vision of lives of dignity and meaning. For example, how should stakeholders reflect on an increase in costs for a building project so that it also includes the provision of accessibility measures to make that building able to serve persons with disabilities?

2.3 Overview of values mapping methodology

In all these cases, and many more, values mapping entails the following four steps, as briefly described below (these methodological steps are described in more detail later in Section 6):

- 1) **Stakeholders:** Identify the most significant **stakeholder groups**⁸ in the specific project context under review, and then learn through engaging with such groups (through interviews, focus groups, and workshops) what their highest priority moral values are both in terms of their **identity** and their **actions** (or the actions and outcomes that they seek to achieve through their project). By creating moral values profiles of such key stakeholder groups, a facilitated process for solutions can be pursued that allow for trade-offs without sacrificing morally compelling priorities.
- 2) **Context:** Every project takes place within a **physical, environmental, and cultural** context. Effectively, such an intersectional context is itself a “stakeholder”, and the moral values associated with the context (e.g., environmental sustainability, the plight of endangered plants and animals, etc.) deserve consideration as a type of stakeholder.
- 3) **Baseline:** Establish through applied ethics research a **relevant moral baseline** of priority values, norms, duties, and principles that speak persuasively to the project context being considered, and to the priority values of the human and institutional stakeholders. That baseline – which will in all cases start with the primary moral values of wellbeing, dignity, justice, and care, before adding any additional priority values agreed by the stakeholders –

Do no harm?

While international development is often framed around the “do no harm” maxim, development programs and the projects that characterize these programs absolutely intend to change the status quo in ways that can indeed “harm” the interests of powerful elite groups who prosper under the inequitable systems that characterize the status quo.

Under ideal circumstances, such elites will be included as a stakeholder group, so that tough trade-offs can be publicly negotiated and morally justified with those who are now being harmed by the status quo.

In pragmatic applications, the risk of pushback by elites may lead donors to limit the extent of change or even the tone of moral analysis, although such decisions ought to be made with care and accountability.

⁸ It is practical to keep the total number of stakeholder groups as small as possible, to contain costs in analysis and management.

provides the starting point for measuring actual changes to be achieved and as actually achieved through programming and projects.⁹

- 4) **Actions:** Develop appropriate **recommendations for action** based on this values mapping assessment, to guide the final design, implementation, and impact of the project and to ensure the recognition and meaningful responsiveness to the primary and priority values in terms of discernible, measurable results.

3 Intended Users of the Values-Mapping Tool

This tool was designed for:

- **project managers**, who must strive to find common ground and mitigate conflicts among multiple project stakeholders, and
- **project MEL staff** and all who are **using the CLA approach** as the people who may be tasked to conduct values mapping for their projects as part of project management, design and/or evaluation, or advocacy related to this project.

These tools, in the form of variations of this toolkit, have been used with multiple organizations to map the moral values of the organizations and how they play out (or fail to) in their organization’s strategy, programming, advocacy, and day-to-day operations.

The Center’s goal is to see moral values mapping integrated in every international relief and development’s organizational strategy and operations, and then made manifest in the projects and the advocacy that flows from such a strategy and aligned operations. Project managers would gain key skills in building broad and committed support from multiple stakeholders for their project. The MEL or CLA-equivalent system of each organization and project would also benefit from acquiring values mapping capacity to elevate the awareness and knowledge of development practitioners in how moral values support or hinder our efforts for lasting, positive change in the world¹⁰.

Raising awareness of the meaning, role, and significance of moral values as a strong motivational

When to do values mapping?

Ideally, values mapping will take place at an early stage in the Project Cycle (Activity Design & Implementation). If funds allow, it should be repeated mid-way through the project, and as part of the final evaluation, to report to donors and stakeholders on the observed changes in the project outcomes that are attributable to the influence of values and attitudes.

See the Annex for suggested indicators to use for such reporting.

⁹ In cases where “core values” have already been identified and subscribed to by one or more stakeholders in a project, such “core values” should be given consideration by all stakeholders to be included in whole or in part as “priority values” (see the Metham Ethics Matrix, as described earlier).

¹⁰ It is acknowledged that donor procurements have yet to specify that values mapping be part of the MEL or CLA requirements, but this may change as values mapping becomes more widely used.

force and a pathway to clarity can improve the approaches and methodologies used and strengthen the positive impacts and sustainability of the outcomes of our work.

4 Awareness Raising

4.1 What does ethics awareness mean in your project?

The assessment you will undertake, initially with the support of the Center, is intended to assist your team in making the landscape of moral values and ethical principles much more explicit and navigable. In so doing, your project team and key stakeholder groups may more easily understand the significance, meaning, relevance, and ranking of the various stakeholder group's moral values and related ethical principles (and any formal or informal commitments made with respect to them), as they apply to the means intended to be used to achieve a desired project outcome, and to validate the moral significance of the intended outcomes.

Stakeholder profiles

Such profiles inform your project about the identity, roles and underlying values held by any stakeholder or stakeholder group, differentiated in the profile by these parameters. Thus, you may have two or more sets of profiles per group where the mapped values differ across various stakeholders' roles.

This landscape of moral values and ethical principles can be a tangled and mysterious terrain to journey through, or it can be clearly articulated and easy to perceive, and therefore be a source of extremely valuable resources. Such awareness-raising resources can clarify, guide, support, and sustain the project's identity, purpose, priorities, and aspirations, build common understandings and terminology between key stakeholder groups, isolate areas of disagreement or discord, build solidarity and consensus, and call attention to achievements - all from the perspective of applied ethics.



Why it's critical to understand stakeholder groups. Most project managers think of stakeholder groups in terms of their roles and how those actors affect their project. Another way of understanding your stakeholder groups is in terms of their identity, as formed by the moral values and associated attitudes that such stakeholder groups hold. Such values and identities always affect your project, whether you are aware of this or not.

When you complete mapping the moral values of your key stakeholder groups, you will analyze these values: 1) according to each stakeholder group's moral sense of identity; 2) each stakeholder group's specific roles in the project in response to these values; and 3) how each stakeholder group prioritizes their moral values and identities within their moral sense of identity and their roles.

You may be surprised to learn how individuals and organizations/sectors come to concentrate on just some moral values. Understanding this will help you build stakeholder group profiles.

4.2 Awareness of moral values

How will your project be more likely to achieve its goals when you, the project team, and the key project stakeholder groups all have an awareness of both the differing and the shared moral values that each holds? How will it be different, e.g., how well can conflicts between key stakeholder groups be anticipated, avoided, resolved, or mitigated, knowing in advance which key stakeholder groups hold and act on values that other stakeholder groups don't share?

Tapping into this values dimension, then understanding and measuring these values followed by associating such values with the people and stakeholder groups who hold them, are critical steps to facilitate positive change among people and groups who may hold values that support project success, or that alternatively impede your project's success in areas where there is discord.

For example, as development professionals we are trained to hold to a "do no harm" ethical principle or maxim (derived from the Hippocratic Oath that the medical profession aligns with), yet we are challenged daily to fulfill that principle because we lack data (and therefore awareness) of some of the realities faced by project stakeholder groups and affected populations. Most "marginalized" populations consist of persons who often go unseen and unheard because development professionals (and often their own governments and societies) simply do not see or listen to them. Their invisibility is not because development practitioners don't want to see them, but because we often feel constrained by our institutional obligation to focus on the utilitarian norms of maximizing efficiency and effectiveness, which places emphasis on satisfying (i.e., optimizing utility) outcomes for the greatest number of people (even if the interests of smaller groups and individuals are sacrificed in the process).

In project practice, it is often considered inefficient to take the time and cross the cultural boundaries to actively seek out these invisible people (some of whom are intentionally hidden away by their families, e.g., those who have physical or intellectual disabilities).

Practicing applied ethics through values mapping can help us to navigate these challenges and do the work we signed on to do. We know that there will always be people and stakeholder groups who stand in the way or actively push back for whatever reason: their values should be identified too. Understanding the values that motivate them to take the stand that they have adopted may allow you to find common ground and overcome conflicts.

Applying values

Values inform the decisions and actions of stakeholder groups, whether they are conscious of these values and their influence in any explicit way, or if values operate subconsciously.

During training in the use of the Values Mapping Tool, you will learn – in the context of your project – how to (1) generate a conscious, explicit understanding and priority ranking of the moral values held by the key stakeholder groups; (2) identify where those moral values are most likely to support project activities and goals; and (3) identify where those moral values are likely to engender disagreement, conflict or discord that inhibits the project's success.

Values mapping is descriptive ethics—how you traverse the moral landscape—in other words, a moral geography. Let’s get started!

5 Ethics 101

5.1 What do we mean by applied ethics?

Applied ethics¹¹, as a discipline, explores the means and ends of pursuing human well-being. In so doing, applied ethics evaluates the **moral values** (related to actions) and **moral virtues** (related to human character) that influence the freedoms, opportunities, capabilities, functionings, security, access to resources, democratic participation, and leadership attributes that are all directly linked to human well-being.

Principles and Values

Ethical principles serve as guides for behavior and judgment, usually in a specific context, and are derived from moral values.

Moral values underly and inform ethical principles.

Applied ethics also concerns itself with all that stands in the way of achieving these key well-being goals. Applied ethics, through robust normative analysis, helps stakeholders to understand systems of oppression (e.g., autocratic governments) and pernicious values (e.g., sexism) that obstruct the recognition and respect for universal, equal human dignity, and that impede the necessary intersectional respect for the integrity, health, interdependency, and protection of the environments and ecosystems that humans require to pursue and achieve that well-being.

In pragmatic practice, applied ethics considers four primary values that in turn offer defensible measures (i.e., changes to attitudes and actions) to maximize the human freedoms and opportunities that are most closely associated with **wellbeing, dignity, and justice**, while avoiding moral problems, morally problematic practices and policies, and unintended negative consequences whenever possible.¹² Applied ethics also helps us to tap into the **care**¹³ that motivates desirable action within international development.

Applied ethics depends on the underlying and core moral commitment of successful human societies to **recognize and respect universal, equal human dignity**. That commitment provides

¹¹ In the context of international relief and development, “applied ethics” is often referred to (especially in academia) as “development ethics”. Development ethics is well established within academic circles, and it has a rich and varied literature.

¹² In research on human subjects, for example, the primary *ethical principles* are respect for persons, beneficence, and justice. Such ethical principles guide (or should guide) monitoring, evaluation, and learning (MEL) efforts, and the collaborating, leaning, and adjustment (CLA) approach.

¹³ Applied ethics also recognizes the underlying moral value of beneficence which adds to this wellbeing, dignity, and justice commitment by drawing upon the very human qualities of care and compassion, acceptance of our interdependencies, altruism, and the recognition of the whole range of key human capabilities that we all need to achieve well-being. For this reason, the Center for Values has added “care” to the standard Mepham Ethical Matrix.

the foundation for human rights, autonomy, agency, self-determination, and freedom of individuals, and the flourishing of their families and their societies.

In the practice of applied ethics, it becomes evident that in many contexts, some people (children, women, and all marginalized persons) are more likely to lack the agency, freedom, and opportunities for decision-making that most men take for granted. Such a disparity runs against the agency, autonomy, and respect for the universal and equal dignity of all persons.

Understanding the underlying values of project stakeholder groups will help you in your work, especially in making these “invisible” marginalized persons (and their needs, aspirations, identities, and priority values) more present within a project context. As you become better aware of the moral priorities, aspirations, cares, hopes, and concerns of all stakeholders, you will understand what is most likely to motivate each of them. This tool and the training associated with it will help you as project planners and designers, project managers, project MEL specialists, and all who use the CLA approach to understand and to measure for your project the relevant stakeholder groups’ priority moral values, identify which values are most important to them in specific contexts, where their moral values are most likely to come into conflict with the moral values of other stakeholders, and how achieving clarity in moral values can assist in conflict avoidance and in decision-making. Perhaps most importantly, you as a project planner, project designer, project manager, or project MEL/CLA specialists will be able to **make the linkage between the priority moral values that your key stakeholder groups profess to hold dear, and the actual measurable project performance** in this regard.

5.2 What are values?

Moral values are individual beliefs that motivate people or organizations to identify themselves and to act in particular ways. They serve as a guide for human behavior, whether as an individual or as a group with a common (shared) purpose. Generally, individual people are initially predisposed to adopt the values that they are raised with, although they may come to reflect on and reach their own considered (and morally defensible) choices on the values that they most highly prioritize in their lives. Organizations and stakeholder groups similarly are either established with a specific set of core values clearly articulated and/or commonly inferred (most commonly held to include wellbeing, dignity, justice, and care), but the selection, revision, and/or prioritization of additional values by organizations and stakeholder groups may be connected to leadership (executive or board), staff participation, stakeholder group demands, or a combination of these influences.

The moral values that an individual, organization, or project selects and prioritizes will help to frame the moral principles that guide the individual, organization, or project in decisions on actions, choices, opportunities, and decisions. **Ethical decision-making often involves weighing values (in some cases against each other) and selecting which values to elevate.** Conflicts can result when the choice of values leads to a clash of preferences and priorities.

Some moral values have intrinsic worth, such as love, truth, magnanimity, trustworthiness, and freedom. Other moral values, such as ambition, responsibility, diligence, resilience, accountability, and courage describe traits or behaviors that are instrumental as means to an end. Some values are not moral at all (amoral), such as a knife's sharpness or a machine's cost-effectiveness. Still other values are considered sacred or based on religious convictions, but – unlike secular values justified by reason – religious values are only considered as moral imperatives for those who choose to believe in them. Whether moral values are secular, sacred, have intrinsic worth, or are a means to an end, values vary among individuals, stakeholder groups, organizations, and projects, and these values evolve and change across cultures and time. Moral values also can be either positive or negative. However, values (e.g., care) are universally recognized as a driving force in ethical decision-making, and in motivating the requisite actions to take place.

Within the larger universe of moral values, some important differentiations often arise:

- **Primary values:** While subject to philosophical debate, for practical reasons in applied ethics we start our moral focus with just four “primary” values: **wellbeing** (which can refer to human beings as well as to the environmental ecosystem), **dignity, justice, and care.**
- **“Core” values:** Many individuals, stakeholder groups, and organizations use the term “core values” simply to imply priority weight for a selected shortlist of moral values (usually not more than seven). Such core values ought to have wide application in the context of the perceived identity, actions, and concerns of one or more key stakeholder groups, but in practice such “core” values are the product of a small committee delegated by leadership to “come up”

Local vs. universal values

How do we as project planners and designers, project managers, or project MEL or CLA specialists navigate a challenging moral landscape where our professional principles and the values associated with them, e.g., belief in equal human rights and universal human dignity of all people regardless of their race, gender, ethnicity, sex, sexual orientation, gender identity, etc., differ from those found in cultural and social norms where we work?

While the answer to this question has political and diplomatic implications and often requires explicit policy guidance from a donor, being aware of this challenging conflict of values is important for all stakeholders involved in a project.

This type of conflict is just one example of such incommensurable values that occur every day in international development, where one of our principles is to do no harm.

How do we honor that “do no harm” maxim while our common development practice frequently ignores marginalized people who often go unseen, unheard, and who are excluded in their own societies?

with such a list. These purportedly “core” values seldom become identified through any robust participatory process and, hence, they may not reflect the actual identity and sense of mission held by most persons within such groups or organizations. Negative values typically do not function as core values. If genuinely supported by stakeholders, a “core” value can be considered as a priority value.

- **Priority values:** Technically, a core value is any value, fundamental goal, or objective around which a person or stakeholder group structures their significant position, identity, action, or strategy. Things, goals, principles, performance standards (e.g., professionalism), and even aspirations can be properly described as having core value if they are inherently high priority values, i.e., their value is not instrumentally linked to their utility for achieving something else of further value.
- **Instrumental values:** Moral values that derive their significance from a “use” or in a “means” relationship to a core or priority value are called instrumental values. Things identified as means to ends by virtue of their instrumental value (e.g., tools) are typically seen or treated as replaceable. When an instrument or tool wears out, a replacement can normally be found, constructed, or purchased. Normally, the comparative instrumental value of things is also relatively easily calculated. Thus, if someone has a job to do, various ways of doing that job can be compared and their relative value determined. For related reasons, the instrumental value of things also can be calculated or measured in monetary terms, e.g., where the use of scarce resources is in question. Negative values can often function as instrumental values. Many moral values (e.g., caring, empathy, collaboration) can be either core or instrumental, depending on the context.
- **Prerequisite use values:** in some cases, the value attached to things is derived from their noncausal, internal, or logical relationship to the core or priority value to which they were connected. For example, if a stakeholder identifies “wilderness experience” as a core value, it is obvious that such a wilderness experience requires the existence of wilderness. In this example, wilderness therefore derives its value from the value placed on wilderness experience, which in turn presupposes access to wilderness.
- **Pointer values:** These are instrumental values that point to the core or priority values which gave them their instrumental significance. An example would be “diligence” as it relates to “professionalism”.
- **Symbolic values:** Symbols can serve as a “derivative value” in certain circumstances. The concept of a symbol (e.g., a Christian cross, or a national flag) is neither esoteric nor obscure. However, symbols are not typically identified as either core or instrumental values, yet they can offer important motivation, meaning, and significance for those for whom they serve as symbols, and in their usefulness in symbolizing things that are themselves important. Furthermore, symbolic values are derivative, i.e., they have value only until what they symbolize loses its value. Typically, symbolic values are not replaceable in the way in which instrumental values (tools) are replaceable. Their value cannot be measured or calculated in monetary terms. Finally, their use and application is not typically the preserve of experts.

6 Values Mapping for Projects

As described briefly in Section 1.3 above, values mapping for a project is a process of identifying the key stakeholder groups, and then the values held by such stakeholder groups, and organizations related to, in this case, your project.

The steps we will follow together are described in more detail below:

6.1 Key stakeholder group identification

The identification of key stakeholder groups entails a consultative process with the project design/management/implementation team(s), the donor or funder, the legitimate authorities (relevant local and national government departments), relevant civil society representatives, and representatives of the population groups whose interests are most likely to be directly affected (for better or for worse) by the proposed project. Depending on the complexity and scope of the project, it is important to limit the overall number of key stakeholder groups to a manageable size (ideally not more than five) by asking them, where appropriate, to present a plausible and legitimate claim of linkage, i.e., a causal connection between the impacts (or lack of needed impacts) of a specific project (in terms of means/methodology and of ends/outcomes). Where stakeholder groups overlap significantly in their interests, concerns, and orientation, it is often possible and cost-effective to try to combine these into one larger and more embracing stakeholder group. Stakeholder groups ideally should have one or more points of contact to facilitate communications and the organization of subsequent research interventions (e.g., key informant interviews, focus group discussions, surveys, etc.)

6.1.1 Initial interaction with stakeholder groups

Those involved in values mapping (MEL/CLA staff and project managers) start by establishing rapport and trust with each of the identified key stakeholder groups. This requires taking some time to listen carefully to what the key stakeholder group's representatives feel is important to share with you, and taking careful note of what issues they raise (while trying to note any use of values vocabulary).

6.2 Moral Baseline

Establishing a moral baseline will provide the starting point for measuring the actual changes achieved through use of the values mapping tool. For this tool, the focus is on the project, and establishing the baseline entails the following activities:

6.2.1 Background research

Depending on the specifics of the project, in many cases it will be important for the project design/management/implementation team(s) to carry out basic quantitative and qualitative research (which may include a rapid literature review) into the pertinent issues that help to define the context in which the project is taking place, who it will most likely benefit, how it was identified, which project stakeholders and actors have particular functional (or symbolic or

cultural) roles and why, how resources for the project were identified and accessed, how the project intersects with larger environmental factors, etc.

6.2.2 Project documents review

Through a values-sensitive review of project-related documents and other identified resources specific to that project (e.g., the project’s proposal, work plans, MEL/CLA plans, reports, etc.), the project management team should be able to identify how and to what extent values-based parameters arise. In so doing, part of the “values landscape” that forms the context for the project can be identified more explicitly. Through an assessment of frequency of specific moral values found in such documents, with incidence being an indicator of relevance and importance, a shortlist (typically not more than 12 priority moral values) can be identified that are closely related to the project.

6.3 Prioritizing values

Through a participatory and deliberative process involving a cross-section of those who constitute each specific project stakeholder group, and the project management team representing the proposed project, this combined prioritization and shortlisting of moral values is often conducted in a participatory workshop. This ultimately results in a short list (7-12) of the project’s priority values and a synthesis of the combined moral values of all the priority stakeholder groups, organized to show which values align, which are in conflict, and which are neutral. This information will be evaluated for trends and key observations, ultimately providing the factors used to justify the final selection of Priority Values. Where appropriate, “priority” values can be separated between means and ends (some values will apply to both), and that final shortlist can then be used to evaluate both means and ends to ensure positive alignment.

6.3.1 Formal interaction with stakeholder groups

Formal interaction follows through scheduling and holding key informant interviews (KIIs) and focus group discussions (FGDs) with representatives (gender-balanced where possible) of the identified key stakeholder groups, using research instruments (e.g., questionnaires) formulated for this purpose. These interactions are intended to make explicit the values that those who participate in the project use to inform their identity, their group’s goals and aspirations, their means of pursuing and sustaining these goals, and what constitutes for them a “good” project outcome. These interactions and research questions will seek to identify moral values that the person(s) make reference to, and the weight (importance to the interviewee) of such values, in order to establish a short hierarchy of priority values for both instrumental and primary values (some moral values can operate in both capacities) for each stakeholder group, which in turn can be evaluated for areas of convergence and potential conflict between stakeholder groups.

6.3.2 Participatory processes for values prioritization

In larger and more complex projects, where the distillation of multiple moral values into a short list of priority values is complicated, it may be necessary and appropriate to gather a large number

of project stakeholders together to deliberate which moral values they feel ought to be ranked highest. That final short list (usually of not more than 7 values for means, and 7 values for ends) will then form the basis upon which indicators are formulated.

6.3.3 Project visioning

In some instances, where a strong consensus is desired around priority values, it may be possible to use the “whole system in the room” (WSR) technique. Such convening to generate a WSR with all stakeholders deliberating in a facilitated process typically takes the form of participation to create a shared **Project Vision Statement** that stakeholder groups and the project management team agree to address and be guided by (especially in times of disagreement and conflict). Project Vision Statements are particularly helpful in building and sustaining motivation within a group on what constitutes achieving “meaningful results” in the project.

Vision Statements

Vision statements must be responsive to recognized problems and challenges. But they are also – and very importantly – about (1) establishing common ground between diverse stakeholder groups, and (2) motivating the shared search for opportunities and freedoms.

The Project Vision Statement itself is not a list of priority values, but it is instead a qualitative description of the type of project result that exemplifies and sustains such values. Having such a vision statement leads to clarity and solidarity, through the co-creation and sharing of a concrete and explicit vision statement that all stakeholder groups and the project management team commit to and are motivated by. Based on the data and WSR experience, and on the findings from engaging with the priority stakeholders, it will be possible to identify which moral values deserve further reflection and thought to meet the goal(s) described in the vision statement, or to fill in any gaps.

6.3.4 Values review and attitude change

The values mapping work carried out above should generate clear guidance on where values align (in terms of the project’s means and its final intended results), as well as to flag the fault lines and areas of disagreement that exist between the project itself and the identified priority stakeholder groups. Raising awareness of all concerned about this values landscape, perhaps through facilitated participatory deliberations, can help to reinforce common ground and to work together to resolve potential points of conflict or disagreement.

7 Instructions for Project Values Contextual Analysis

7.1 Key stakeholder group values contextual analysis

Contextual analysis requires gathering all relevant project-related documentation including:

- Detailed project technical proposal and parameters
- Relevant strategy documents
- Work plan(s) and schedules
- MEL plan(s) and CLA approach insights

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- Theory of change/results framework and accompanying narratives (if they are not embedded in other documents)
- Project progress reports (annual, quarterly, MEL, CLA, etc.)
- Special studies, baseline, assessments, etc., if available and relevant
- Policies, regulations, laws outside of the project's control that affect the project
- Others, as determined by the project team and the client

Using qualitative analysis tools or deep reading, scan the documents and run analyses for the most used words (incidence analysis). Filter selected moral values until you have the words—and their contexts—that convey moral values, both as means and as ends (in some cases, they will be both). Review the words and the excerpts in which they are found to identify moral values and how they are interpreted contextually within the documents.

Prepare a list of moral values found, citing an example of each, and their definitions to share with the project team (and later with all stakeholders when you expand the mapping to all stakeholders).

7.2 Key stakeholder group values situational analysis

The next step is to prepare tools for participatory engagement with project stakeholders to validate the project's contextual analysis findings and delve more deeply into the most significant moral and ethical factors associated with performance (methodologies and results / means and ends).

To capture this, it will be necessary to develop KII and FGD guides (also known as research instruments) relevant for the project and the key project stakeholders. Leave space as you would with any participatory engagement for emerging values, perspectives, and constructs. You are NOT just validating findings. You are seeking the clearest possible articulation and prioritization of the project's moral values that the relevant stakeholder groups' representatives are able to share. How such representatives talk about these moral values and ethical principles, and how they provide persuasive and well-reasoned justifications for their moral positions, provide important data for your analysis.

7.3 Key Informant Interviews

The purpose of the KII is to establish a baseline of what is the current moral awareness, concerns, and priorities (differentiated between needs and aspirations) among the representatives of the key stakeholder groups at the project level, the impact of action-oriented decision-making that is guided by such moral values (e.g., exercised through reflective thinking, deliberations, rational justifications, and debate), and their general familiarity with moral values and ethical discourse.

8 Conclusions

When the project values map is completed, the project will use the results to navigate its moral landscape by mediating points of contention before they become conflicts that arrest or otherwise impede the project's work. The Center will train and mentor the project management team through the process so that they can continue to use values mapping throughout their current project and their other existing and future projects. By the end of this exercise, the program management team should be able to identify key stakeholder groups (not only the obvious ones), conduct a moral baseline using the steps described in this tool, and use the tools developed in the process to re-assess the values (means and ends) over time. By measuring the values over time throughout the project, the project management team can better motivate key stakeholders, make the best and moral decisions around the use of resources, assess the project's outcomes from the "do no harm" and other relevant moral perspectives, and assess if key stakeholders' values are shifting (and how much, and in what ways) over time.