

2019

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Recommended Citation

Condren, Michael (2019) "Self-Directed Universalists: Social Heroes and Value-Oriented Challenges to Authority," *Heroism Science*: Vol. 4 : Iss. 2 , Article 8.

DOI: 10.26736/hs.2019.02.08

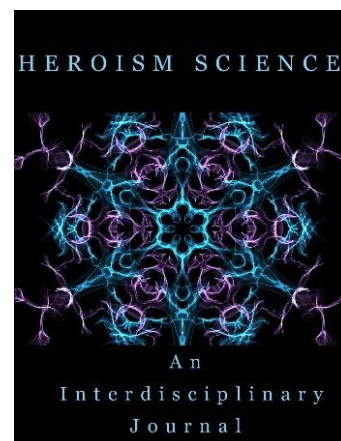
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Heroism Science: An Interdisciplinary Journal (ISSN 2573-7120) <https://scholarship.richmond.edu/heroism-science/>

Vol. 4 No. 2 (2020) pp. 1-38

Self-Directed Universalists: Social Heroes and Value- Oriented Challenges to Authority



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ABSTRACT: This study investigates the role of values in the actions of social heroes, which previous research has suggested may play a role in motivating principled challenges to authority. Kelman and Hamilton's (1989) orientation to authority framework was used to identify when value-oriented challenges to authority – suggestive of later social heroism – first emerged in their lives, and the values associated with those behaviors. Analyses of archival interviews with 15 leaders of a social activist group found that all participants acted on a value orientation to authority, and they considered these actions to be important experiences in their development as social heroes. The values most associated with these actions were self-direction, universalism, power and achievement. Four participants made value-oriented challenges to authority in childhood; 14 by late adolescence; and all by young adulthood. The early emergence of this behavior suggests that a value orientation to authority is a core element of their identity, and value-oriented challenges to authority were critical experiences in their developmental trajectories as social heroes.

KEYWORDS: *social heroism, heroes, values, activists, heroic self-efficacy, heroic imagination, orientation to authority*

Article history

Received: January 28, 2020

Received in revised form: March 10, 2020

Accepted: March 13, 2020

Available online: April 4, 2020

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1 AUTHOR'S NOTE

This research stems from a master's thesis at Claremont Graduate University. I would like to thank my mentors and advisors, Mike Csikszentmihalyi and Jeanne Nakamura, for their valuable advice and contributions to the development of this study.

2 INTRODUCTION

Societies, institutions and individuals need people who are willing and able to remind them of their values and principles, and to challenge them when those values are not being observed in practice. Frequently this role is played by social heroes, who act in the service of ideals to defend and preserve community-sanctioned values – often by challenging authorities and institutions that violate those values, despite great personal risk and cost to themselves (Franco, Blau & Zimbardo, 2011). Opportunities for social heroism abound in society and can be encountered throughout the lifespan: in the classroom, the office, the public square or – for Rosa Parks – the public bus (Hero Round Table, 2018). And yet it remains an exceptional behavior that emerges infrequently.

An important question related to the emergence of heroism is: Does heroism result from dispositional forces, situational forces, or some combination of the two? The dispositional perspective sees heroes as extraordinary individuals whose heroism is rooted in moral character development and personality (Walker, 2017). The situational perspective maintains that heroes are ordinary people who undertake extraordinary actions required by the circumstances in which they find themselves (Zimbardo, 2017). Bridging the situational/dispositional divide, research by Walker, Frimer and Dunlop (2010) suggests that focusing solely on situation or disposition is ill-advised as it misses the combined effects of both transient behaviors and behavioral trends. Indeed, Frimer's research (2018) suggests that heroic behavior results from the interaction of individual dispositions with specific situations that call for heroic behavior. Callina and colleague's (2017) relational-developmental systems

(RDS) perspective integrates elements of the situational and dispositional perspectives. In this view, the capacity for heroism develops via particular life lessons and experiences acquired in negotiating a course through one's environment, as one seeks both to make sense of and contribute to that environment (Callina et al., 2017).

The interaction between the individual and their environmental context suggests a potentially important role for values in the emergence of social heroism. Values are central to an individual's identity and self-concept (Rokeach, 1973) and are widely assumed to motivate behaviors and attitudes (Rohan, 2000). Values have been described as trans-situational guides that serve in choosing and evaluating behavior, events and outcomes (Rohan, 2000; Schwartz, 1996). Research suggests that personal adult value patterns are already well established by adolescence, and perhaps sooner; personal values have been shown to emerge as early as middle childhood, and the value systems of children and adolescents mirror the structure of adult value systems (Döring et al., 2015; Knafo & Spinath, 2011; Doring et al., 2010). Thus, social heroes' value systems can serve as important guides as they navigate environmental life lessons and experiences over their lifespan, including situations requiring heroic behavior.

Identifying when behaviors related to social heroism first appear in the life span, and the factors which influence that emergence, may contribute to our understanding of the role of dispositional and situational factors in socially heroic behavior. To that end, this study applies Kelman & Hamilton's (1989) orientation to authority framework and Schwartz' value theory (1994) to identify when value-driven behaviors suggestive of later social heroism first emerged in a sample of social heroes, and the values associated with those behaviors.

2.1 SOCIAL HEROISM

Empirical research has identified three categories of heroism: martial, civil and social (Franco et al., 2011). Martial heroes operate in military and similar occupations such as the police and fire brigade that entail largely duty-bound physical risk. Civil heroes voluntarily risk physical danger, responding opportunistically to dangerous situations requiring instant reaction, and mostly come from the civilian population (Franco et al., 2011). Social heroes, however, can come from all walks of life, and risk their personal well-being to protect and defend principles, values and people (Franco et al., 2011).

Social heroism has been defined as *“heroic action in the service of ideals, and as a consequence the hero may experience lowered social status, lost credibility, financial instability, social ostracization, arrest, torture, risks to family members, and, on occasion, death”*, often over the long term (Franco et al., 2016, p. 6). Social heroes may act in defense of existing community values and principles which are threatened or ignored; to challenge established cultural conventions and practices; and/or to lay the foundations of new community values and principles (Franco et al., 2011). Bringing about social change often necessitates ongoing challenges to norms (political, religious, social, and cultural), the institutions that support those norms, and other powerful interest groups (Franco et al., 2011). Social heroism requires personal and collective resources such as resilience, courage and social support, which develop throughout the life span. Individuals encounter many opportunities for social heroism in the public sphere; for example, institutionalized discrimination, oppression of minorities, biased justice and other violations of professed social and ethical values (Hero Round Table, 2018). Consequently, the barrier to entry for social heroism is set low and broad in terms of age, opportunity and social context, expanding as individuals integrate into their local and global environments.

Two concepts may illuminate how individuals come to cross that barrier. Firstly, a person's heroic imagination may be triggered. Heroic imagination has been defined as a mindset, "*a mental state of anticipation and readiness for any person to act heroically when opportunities arise calling for heroic actions... and, at least in some individuals, the ability to envision and communicate a new way of ordering a social system or an entire society*" (Franco et al., 2011, p. 111). Secondly, the person must assess whether they have the heroic self-efficacy to respond effectively. Heroic self-efficacy is the belief that one has the requisite skills and resources to respond effectively to a situation that requires heroism (Csikszentmihalyi, Condren, & Lebuda, 2017). For Bandura (1986), perceived self-efficacy beliefs play an important role in a person's motivation and their response to perceived threats, and enactment experiences and observational learning from role models are considered to be the most influential source of self-efficacy information (Maddux & Stanley, 1986). Previous research on social heroes' decisions to engage in social heroism found that seeing social heroes acting in the public space triggered their heroic imagination (through epiphany and elevation experiences), and bolstered their heroic self-efficacy (through role modeling and empowerment experiences) (Csikszentmihalyi et al., 2017). These experiences motivated them to join that organization, suggesting that individuals who have developed heroic imagination and heroic self-efficacy are more likely to cross the barrier and respond to situations requiring a heroic response.

2.2 SOCIAL ACTIVISTS AND MORAL EXEMPLARS

Identifying early experiences that trigger the heroic imagination and develop heroic self-efficacy may help us to understand the factors that influence the emergence of social heroism. However, research on social heroism in early life is, to the best of my knowledge, limited. Researchers have tended to study formally recognized heroic behavior occurring later

in life, such as recipients of the “Carnegie Medal for Extraordinary Civilian Heroism” (Carnegie Hero Fund Commission, 2017; Walker & Frimer, 2007; Dunlop & Walker, 2013). Since institutions like the military and the police force have minimum ages to join, the martial heroes that have been studied have been adults, almost by definition. Civil heroes require skills and physical strength which are often developed later in the life span; physical strength in particular tends to favor men as enactors of this type of heroism (Martens, 2005).

Studies of moral exemplars, holocaust rescuers, and civil and martial heroes have tended to focus on their adult heroic activities, but do consider issues of moral development (for example, Oliner & Oliner, 1988; Colby & Damon, 1992; Walker, Frimer, & Dunlop, 2010; Walker, 2017). Colby and Damon’s (1992) study of social activists found that moral development was a lifelong process, which could lead to enhanced integration of the self and morality over the lifespan. For these exemplars, the transformation of goals through social influence was an important mechanism and initiator of moral development (Colby & Damon, 1992). Experiences gained through and in the context of social relationships, institutional and organizational participation and cultural contexts interacted with the exemplars’ personal objectives, beliefs and predispositions (Colby & Damon, 1992). Over time, this social influence triggered personal reevaluations of their goals and beliefs as well as providing opportunities and directions to generate their own unique constellation of morals, values, beliefs and associated behaviors (Colby & Damon, 1995). For these exemplars, social influence greatly contributed to the establishment and transformation of their moral commitments over the lifespan, which could help to develop both their heroic imaginations and heroic self-efficacy.

Research on the development of agency and communion in moral exemplars has also shown that moral development occurs over the lifespan, with an increasing integration of self-identity and moral identity noted by Colby and Damon (1992). Frimer, Walker, Lee,

Riches, and Dunlop (2012) found that while moral exemplars' instrumental motivations' were strongly agentic, their terminal motivations were primarily communally-focused. For these exemplars, agency was instrumental to achieving their terminal, communal aims, suggesting that their moral motivation was integrated hierarchically. The authors see this integration as a developmental process that occurs over the individual's lifespan, one which most adults do not fully realize (Frimer et al., 2012). Similarly, Walker and Frimer (2015) tracked developmental trajectories in moral motivation – specifically, agency and communion – in a random sample of non-exemplars. They found that agency was the predominant instrumental motivation in all age groups in terms of instrumental values. However, agency's motivational dominance in terminal values early in their lifespan weakened over the course of these individual's lives (Walker & Frimer, 2015).

Frimer and Walker (2009) developed a new measure of moral centrality based on Schwartz's values theory (1994) – values embedded in narrative (VEiN) – to study moral centrality. They found that young adults were able to reconcile competing agency and communion into an integrated moral identity. Moral centrality in individual identity was operationalized as values expressed in personal narratives, which were coded for motivational value themes (Frimer & Walker, 2009). Self-advancing agency was linked to Schwartz' values of individual achievement (competence and personal success) and power (social status, prestige, control, dominance); other-advancing communion was linked to the values of benevolence (concern for close others) and universalism (concern for all people, broader society and the environment) (Frimer & Walker, 2009; Schwartz, 1994).

Relating this to social heroism, we can see that three of these values – universalism, power and achievement – are relevant. Social heroism is concerned with the defense of individuals and principles in society (universalism); doing so requires that social heroes act effectively (achievement) in order to prevail in their defense of existing principles, values and

ideals, and/or the institution of new ways of ordering society (power). Acting on these communal and agentic values can provide a means of both developing one's heroic imagination and heroic self-efficacy over time. This combination and integration of agentic and communion values may also be critical in motivating social heroes to go beyond aspirations to do good, to take action to achieve their aims. We turn now to look at how values may play a role in this process.

2.3 VALUES AND SOCIAL HEROISM

Values theory and research characterizes values as being connected to beliefs about what individuals or groups consider to be appealing outcomes and behaviors (Rohan, 2000; Rokeach, 1973). Values help individuals and groups to select and evaluate specific behaviors, and they serve as motivational guides to behavior (Rohan, 2000). Values also indicate what is important to their holder, and can become central to an individual's self-identity (Schwartz, 2016).

The dominant framework in the literature is Schwartz' value theory (1992, 1994), which defines values as "desirable, trans-situational goals, varying in importance, that serve as guiding principles in people's lives" (Schwartz, 1994, p. 21). Schwartz' values theory identifies ten universal values, distinguished by their motivations (Schwartz, 2012). Rather than being discrete and separate, Schwartz presents values on a circular continuum to illustrate the relationships between their motivations (Schwartz, 2016). Values closer on the circumplex have more similar motivations than values further away, which will be increasingly opposed and antithetical (Schwartz, 2012). For values to motivate and influence behavior and attitudes, they must first be activated (Schwartz, 2016). To be activated, values must be considered relevant both to the situation and to the proposed behavior. Important relevant values can motivate individuals to pursue value goals (Schwartz, 2007). Values that

are held as relatively more important by an individual are more accessible and are therefore more likely to be activated and to influence behavior (Schwartz, 2016).

In addition to the values mentioned earlier (universalism, power and achievement), self-direction may also be characteristic of social heroes. Self-direction motivates individuals to think and act independently as they explore and create (Schwartz, 1994). Self-direction is conceptually adjacent to universalism in Schwartz' values circumplex, and may play a role in activating social heroes' heroic imaginations, motivating their challenges to the status quo, and creating new community values and practices (Schwartz, 1994). We turn now to a framework that describes how individuals relate to authority, which provides a means of identifying the role of values in social heroes' challenges to authority (Kelman & Hamilton, 1989).

2.4 VALUE ORIENTATION TO AUTHORITY

In Kelman and Hamilton's (1989) orientation to authority framework, *rule-oriented* individuals are motivated to comply with the rules of society to safeguard their personal interests, whereas *role-oriented* individuals identify with their social roles to ensure their status. *Value-oriented* individuals, however, internalize their society's values and are committed to protecting and upholding those values, even if it requires challenging authorities and institutions when those values are not respected in practice. The three social influence processes of compliance, identification, and internalization reflect an orientation to the society's rules, roles and values, respectively (Kelman, 1974). Orientations to authority are neither dispositional nor mutually exclusive, as a person can hold one or all depending on specific circumstances (Kelman & Hamilton, 1989). Rule-oriented individuals may perceive themselves as subject to the society's rules, which they obey in order to avoid negative impacts and/or gain advantages. They may also obey authority from a feeling of

powerlessness and inability to challenge it. Role-oriented individuals orient themselves to their role as social citizens, and may even occupy a particular role in the authority structure (e.g., bureaucrat, officer of the law). They obey from a feeling of identification with and acceptance of authority and the requirements associated with their role in the system.

Value-oriented individuals differ, in that they judge actions according to internalized moral standards and values; focus on the outcomes and the consequences of their own actions; and can act independently of the relationship with external authority (Kelman & Hamilton, 1989). They take personal responsibility for the consequences of their actions, even when carrying out orders from a hierarchical superior; are willing to challenge what they perceive to be unjust authorities; and expect others to do likewise (Kelman & Hamilton, 1989). Value-oriented individuals have internalized their society's values and are committed to preserving and seeing those values upheld. They are also committed to preserving the institutions and relationships that those values underpin, and are willing to defend them despite personal risks and costs. The authors suggest that when these values are violated by institutions and their agents, value-oriented individuals will redefine those authorities' actions and demands as illegitimate. Redefinition enables value-oriented individuals to then challenge that authority in defense of both personal and social value systems (Kelman & Hamilton, 1989).

Behavior characterized by a value orientation to authority shares certain characteristics with social heroism. Both involve the defense of values, principles and beliefs and entail almost inevitable risks and costs to the enactor by disturbing the social order and authority relationships. Kelman and Hamilton's (1989) emphasis on the need to redefine an authority's demands as illegitimate echoes the heroic imagination discussed earlier, which involves the hero recognizing the need and opportunity for heroic action to defend values and principles, and imagining new ways of structuring society (Franco et al., 2011). It also echoes

Colby and Damon's (1992) and Callina et al.'s (2017) transformation of morals, values, beliefs and behaviors through social influence experienced through participation in society, organizations and relationships. These similarities suggest that value-motivated challenges to authority early in social heroes' lives may prefigure later acts of social heroism, and may help to develop both heroic imagination and heroic self-efficacy. The orientation to authority framework allows identification of when value-driven challenges to authority emerged in the lifespan of social heroes, and the values associated with those challenges.

2.5 CURRENT STUDY

Research into challenges to authority frequently use the Milgram and Utrecht paradigms, laboratory settings, and scenario techniques (e.g., Milgram, 1974; Bocchiaro & Zimbardo, 2010; Bocchiaro, Zimbardo & Van Lange, 2012; Meeus & Raaijmakers, 1995). However, these approaches lack the realism of real world settings and lived experiences, and often rely on people accurately predicting how they would behave in a hypothetical, complex and unfamiliar situation, highlighting the drawbacks of pursuing research in laboratory settings.

The current study addresses these drawbacks by focusing on the lived experiences of social heroes, through analysis of archival interviews with social activists (predominantly gay and lesbian) who were leaders of ACT UP/New York (see below for a description of the organization). This study applies an orientation to authority framework (Kelman & Hamilton, 1989), value theory (Schwartz, 1992, 1994) and VEiN methodology (Frimer & Walker, 2009) to identify when value-driven behaviors suggestive of later social heroism first emerged, and the values associated with those behaviors. This is a very demographically-specific sample whose developmental trajectories and relationship to authority may not generalize to all types of social heroes. However, previous research on social heroes using this archive suggests that

these interviews can shed light on both individual and organizational aspects of social heroism (Csikszentmihalyi et al., 2017).

The study takes a narrative approach to understand the emergence of social heroism in heroes' lived experiences. Narrative analysis is predicated on the assumption that individuals make sense of their lives and construct their identity through stories (McAdams 1995, 2001, 2013). These internalized stories of the self are used to make sense of and incorporate their experiences into what McAdams calls the narrative identity (McAdams, 2013). McAdams and others argue that an individual's personality is comprised of their narrative identity, goals and values, and dispositional traits (McAdams & Cox, 2010; McAdams & Olson, 2010). Hence life stories are an essential component of personality, which can be studied to illuminate questions related to the development of personality and identity (McAdams, 1995; McAdams & Pals, 2006; McAdams, 2013). How individuals make sense of their experiences reveals how they act in the world and the meaning of those experiences in their lives (Adler, Lodi-Smith, Philippe, & Houle, 2016). Narrative identity thus enables us to understand the meaning of lived experiences in the context of the individual's lifespan (Adler et al., 2017).

Narrative analysis is frequently carried out through qualitative research (Adler et al., 2017). Narrative data range from accounts of specific incidents or experiences to comprehensive life stories, and the narrative identity approach can be applied to data that were not collected for specifically narrative purposes or by narrative researchers (Adler et al., 2017). Narratives focus on understanding the context-specific functions that accounts of experiences serve and how they relate to other outcomes and variables (Adler et al., 2017). Narratives cannot establish the historical truth of the memories that comprise the life stories, instead providing a narrative truth (Dunlop, 2017). Narrative data can be merely self-reports of thoughts, feelings, ideas, etc.; however, narratives can offer more than self-report measures insofar as they are situated in the individual's sociocultural experiences throughout their

lifespan (Adler et al., 2016). Among other topics, narrative identity researchers have focused on political, religious and ethical values (Frimer, Walker, Dunlop, Lee, & Riches, 2011; Gregg, 1991; McAdams, 1985, 2006), as well as motivational themes relevant to value orientations to authority including agency and communion, autonomy, power and relatedness (Walker & Frimer, 2015; Frimer et al., 2011; Adler et al., 2016).

3 MATERIAL AND METHODS

3.1 PARTICIPANTS

The sample consisted of 15 leaders of an AIDS activist group (ACT UP/New York) during the period 1987-1992 (seven females, 8 males; mean age on joining the group 32.2, range 23-52). The sample was predominantly Caucasian (14 participants), well educated (15 at undergraduate level, five at graduate level), and relatively high socioeconomic status (six reported upper middle class backgrounds, seven middle class, and two working class). All the males identified as gay; six women identified as lesbian; one woman as heterosexual. Thirteen of the respondents were HIV-negative when they joined the activist group. Eight participants reported growing up in Jewish families.

3.2 DATA

The ACT UP Oral History Project is a collection of interviews with surviving members of ACT UP/New York, many of whom had leadership roles in the organization. The archive's purpose is to "*...present comprehensive, complex, human, collective, and individual pictures of the people who have made up ACT UP/New York... These interviews reveal what has motivated them to action and how they have organized complex endeavors.*" (<http://www.actuporalhistory.org/index1.html>). The interviews were conducted to provide

information to researchers and activists about the organization and its members at both the individual and group levels. The interviews explore members' motivations for participating, their personal characteristics and histories, and their individual and group processes for strategizing, organizing and executing sustained activism and social heroism. Interview transcripts are freely available on a public web site for download (www.actuporalhistory.org); the original videos are housed at the New York and San Francisco Public Libraries. The project was funded by a major grant from the Ford Foundation, and other donors.

Members of ACT UP/New York were invited to participate by being interviewed in their homes, starting in 2002. Participation was voluntary; all participants provided written, informed consent. The first interview was conducted in 2002 and the final interview in 2015; 186 interviews in total were conducted with 188 interviewees. At the time this study was conducted, transcripts of 130 interviews were available online. Interviews ranged from 1 to 3 hours in length, were semi-structured, and focused on eliciting information about the participants' particular experiences in the group.

The semi-structured interviews were conducted by the project's archivists, neither of whom is a psychologist. Their goal was to capture data on the interviewee's breadth of experiences in the organization – reasons that were not strictly aligned with the current researcher's goals. Hence they did not ask direct questions about the interviewee's values or orientations to authority, so data relevant to this study's focus were embedded in participants' responses to other questions about their lives and activities prior to and after joining the activist group. These data emerged as part of larger discussions about the group's mission, strategies, tactics and context. However, the vast majority of interviews start with general questions about the subject's childhood, adolescence, family, and the personal life experiences that led to these people joining the group. These sections provide information

about formative influences and life experiences which they considered relevant to their development as activists and social heroes.

Archival data present both challenges and opportunities for researchers. Archival data recount historical events while communicating the participants' associated psychological states – their thoughts, feelings, memories, and personal meaning of the events (Byford & Tileagă, 2017). These data can provide researchers with opportunities to study phenomena occurring in real-world settings, rather than laboratories (Heng et al, 2018). However, as the data were collected by someone other than the researcher, they often reflect the data collectors' perspectives and biases, and do not precisely match the researcher's questions and objectives (Zaitzow & Fields, 1996). This requires that researchers approach the data with sensitivity to its strengths and weaknesses. Successfully doing so can enable researchers to link psychological phenomena to behavioral outcomes, particularly in the field of organizational research (Barnes, Dang, Leavitt, Guarana, & Uhlmann, 2018). Previous research using this dataset has produced findings on both individual and organizational aspects of social heroism (Csikszentmihalyi et al., 2017).

3.3 PROCEDURE

The author asked the archivists to nominate interviewees who were generally recognized as having been the most influential in forming and leading the group; in defining and shaping its culture; and demonstrated sustained and committed involvement in developing and implementing policy, strategy and tactics. In practice, that means they were consistently very active over a period of several years, served on committees and/or had defined and recognized leadership roles. This exemplar approach deliberately chooses individuals who have been identified as demonstrating a high level of development in the construct that is the topic of interest (Bronk, King, & Matsuba, 2013). Exemplars differ

strongly from others due to the extent to which they demonstrate particular qualities, characteristics and behaviors, but resemble more typical people in most other respects (Bronk, 2012). This approach allows us to study the phenomena of interest as it is expressed in a highly developed manner (Bronk, 2012). Exemplar methodology has been used in studies of moral exemplars (Colby & Damon, 1992), and more recently in heroism research (Walker, Frimer, & Dunlop, 2010; Walker, Frimer, & Dunlop, 2012; Bronk & Riches 2017; Csikszentmihalyi et al., 2017; Nakamura & Graham, 2017).

Based on these criteria, the archivists nominated and agreed on a subset of 35 exemplary leaders. Name searches of the exemplars were conducted on the remaining 95 non-exemplar interviews, to confirm that the exemplar's leadership and influence were reflected in the narratives of other members; they were. Due to the exploratory nature of this research, the final sample size was restricted to 15. Of the 35 nominees, an initial sample of 30 interviews was used for exploratory analyses. This was composed of the 5 interviewees with the highest frequency of mentions by other exemplars in their interviews, and 25 selected at random. These were open coded to identify hypothesized and emergent themes. Then a random sample of 15 exemplars was chosen for the analyses reported here (M interview transcript length = 57.6 pages, range 41-90.)

3.3.1 Coding and data analysis

A codebook was developed based on Kelman and Hamilton's (1989) construct definition of orientation to authority. The Values Embedded in Narrative (VEiN) coding manual was used to code values expressed in those orientations to authority (Frimer & Walker, 2009). Four coders coded the interviews; three were blind to the study's purpose.

3.3.1.1 Phase 1 coding: Orientation to authority

The first phase of coding focused on orientation to authority. This variable is discussed in the literature as a possible factor in disobedience to an unjust authority

(Bocchiaro & Zimbardo, 2010; Bocchiaro, Zimbardo & Van Lange, 2012; Meeus & Raaijmakers, 1995). The principal investigator coded the interviews for actions taken that expressed an orientation to authority (rule, role or value). Two additional coders (blind to the study's intent) were trained on a practice interview. They then coded the principal investigator's extracts; the results were discussed with each coder separately, and differences were discussed and resolved. Percentage agreement (P_A : ratio of agreed items to total number of items) between coders was $P_A = 87.6\%$. This method has been used in previous research as a more suitable method when specific units are being extracted from larger bodies of semi-structured interviews, as these data were (Lilgendahl & McAdams, 2011; Korobov & Thorne, 2006). Items on which both coders could not agree were excluded from phase 2 coding.

Next, actions were sub-coded as occurring prior to or during ACT UP/NY membership. Actions were also coded for the developmental period in which they occurred (childhood, early adolescence, late adolescence, young adulthood, adulthood). See Table 1 for orientation to authority code definitions and Table 2 for examples of value orientation statements.

Table 1

Orientation to Authority Code Definitions

Definitions
Rule: Obeys authority from a feeling of obligation, a feeling of identification with the state/citizen role, or feeling bound by authority's definition of the situation
Role: Obeys authority from a feeling of powerlessness, or a feeling of being unable to challenge authority
Value: Challenges and disobeys authority when the individual considers: <ul style="list-style-type: none"> - that the authority is violating their central values - that challenge or disobedience would embody their central values

Note. These definitions are based on Kelman and Hamilton's (1989) description of orientations to authority.

Table 2*Examples of Value Orientation to Authority Statements*

Prior to group membership:

“I organized a demonstration against our parish church because there was this young priest who would have a group of kids go to, at the time, these projects at Newark - to have them like paint and clean things. A lot of parishioners had taken up a petition to have them transferred because they didn’t like the idea that their kids were being taken to these awful neighborhoods. And six of us stood in front of the church with signs. And my mother was coming to church.”

“I was in this thing called the Coalition to Stop Institutional Violence, which was a group that was organized around this prison unit in Worcester State Prison that was a kind of hybrid prison psychiatric thing that was going to use these sort of really sensory deprivation and all of these kind of intense torture-like techniques on this sort of select group of women. I don’t know how I got involved with them, but I was a psychology major, and just the whole idea of sort of institutionalized oppression using this psychiatric system, it got me somehow. So we organized to shut down this unit and so we organized hearings, and basically they were trying to open it up without going through with the procedures they were supposed to.”

During group membership:

“Well, the needle exchange case was a different thing completely... We actually were doing something that needed to be done that the government should be doing but wasn’t doing, and we were doing it because we had to save lives because we were in an emergency. And so it was just a whole different thing conceptually. We were doing the right thing, and we should not only not be punished for it, we should be able to keep doing it. In fact, the government should do it. So it was a totally different kind of a trial, and it had the potential to change government policy on needle exchange, and in fact it did.”

“So I’m listening to this testimony, and we just happened to have a Housing Committee meeting that night, and we were all just totally disheartened. I said to the group, “Look, if we’re going to get the people we care about housed, we’ve got to come up with a way to do it ourselves.” And that was it. It was, by the end of the meeting, we’d even come up with the name Housing Works. We were good to go.”

“This was actually our first action. We took over William Grinker’s office – he was the commissioner of HRA (Human Resources Administration) – handcuffed ourselves to his desk, demanding that he house a gentleman by the name of Wayne Phillips, and we got him housed. So we had a quick win.”

3.3.1.2 *Phase 2 coding: Values*

The second phase of coding focused on identifying those values expressed in the actions taken. Each orientation to authority was coded using the Values Embedded in Narrative (VEiN) coding manual (Frimer & Walker, 2009), which applies Schwartz' values theory (1994) to identify values in narrative accounts. VEiN methodology was validated by Frimer et al. (2011) and has subsequently been used in research on moral exemplars (Frimer et al., 2011, 2012; Dunlop, Walker, & Matsuba, 2013; Walker & Frimer, 2015).

The principal investigator and a second coder (blind to the study's purpose) independently coded all the orientation to authority items for values using the VEiN coding scheme. Reliability on the values associated with rule and role orientations could not be established, as there were too few rule (five) and role (none) items. For the value orientation items, security, tradition, stimulation, hedonism, conformity and benevolence were not sufficiently frequent to establish reliability. Reliability was computed for the four remaining values and found to be substantial: self-direction, $\kappa = .87$; universalism, $\kappa = .87$; power, $\kappa = .83$; achievement, $\kappa = .79$. (See Table 3 below for values associated with each orientation to authority.)

4 RESULTS

The purpose of this study was to identify, in a sample of social heroes, when value-driven behaviors indicative of subsequent social heroism first emerged in their life cycle, and the values associated with those behaviors. Interviewees were asked to describe formative experiences which were important in their developmental trajectories as social activists and leaders, and which contributed to them joining and leading ACT UP/New York. They were also asked to describe their activist experiences as part of ACT UP/New York. Actions taken in relation to orientation to authority in these narratives were coded for rule, role and value

orientations (Kelman & Hamilton, 1989); these were subsequently coded for their associated values.

4.1 ORIENTATIONS TO AUTHORITY

Five participants expressed a rule orientation to authority; no participants mentioned a role orientation to authority (see Table 3). Rule orientations occurred at an earlier stage of development (pre-adulthood) and related to hiding their sexual orientation (for the 14 gay and lesbian participants), and conforming to parental expectations to have her baby (one pregnant teenager). Most of the gay and lesbian respondents mentioned that they later “overcame” or “got past” these orientations by coming out publicly about their sexuality. The paucity of mentions of rule and role orientations to authority suggests that for these social heroes, these orientations did not play an important role in their development as activists and social heroes, except insofar as they were behaviors and orientations which they overcame.

Table 3

Orientations to Authority: Subjects, Frequencies and Associated Values

	Orientation to Authority		
	Rule	Role	Value
Number of subjects mentioning this orientation	5	0	15
Frequency of orientation statements	10	0	184
Associated Values	Conformity ^b Tradition ^b Hedonism ^{c,d}		Self-Direction ^d Universalism ^a Power ^c Achievement ^c Benevolence ^a Stimulation ^d

Note. N = 15. The values in this table come from Schwartz' (1994) values circumplex, which is divided into types of related and opposing conceptual and empirical associations. These are:

^aSelf-Transcendence values: universalism, benevolence

^bConservation values: conformity, tradition, security

^cSelf-Enhancement values: power, achievement, hedonism

^dOpenness to Change values: hedonism, stimulation, self-direction

The findings for value orientation to authority were rather different (see Table 3). All 15 participants mentioned acting on a value orientation to authority as an important developmental experience. Actions taken prior to group membership comprised 40% of this category; actions during group membership made up 60%. The mean frequency for challenges to authority prior to group membership ($M = 4.93$) indicates a pattern of value-oriented challenges to authority starting early in their development. Moreover, participants considered such challenges to be an important part of their early developmental experiences and contributors to their subsequent activist (and socially heroic) activities. That said, the majority of challenges to authority mentioned did indeed occur while the respondents were active members of the group ($M = 7.33$). This is to be expected, given that a central focus of the interviews was to document the inner workings and logistics of the group's direct actions and civil disobedience. The comparatively overwhelming frequency of value orientations to authority suggests that for this sample of social heroes, a value orientation to authority was both characteristic of and fundamental to their developmental trajectories as activists and social heroes.

Challenges to authority prior to group membership were sub-coded by developmental period (see Table 4). 14 participants² had challenged authorities by late adolescence (four in childhood, seven in early adolescence, 10 in late adolescence). This sample of exemplars started acting on their values to challenge authority early in their life span, and this orientation became more central to their identity as they developed into adolescents and young adults. It also suggests that their adult value systems were established, active and relevant early in their lifespan (Döring et al., 2015; Knafo & Spinath, 2011; Doring et al.,

² One respondent was not directly asked about his life prior to joining the group, and so his personal biography and formative influences were not addressed in the same manner as the other members of the sample.

2010). These early value-oriented challenges to authority may have contributed to their development as social heroes by providing opportunities to develop their heroic imagination and heroic self-efficacy.

Table 4

Developmental Period of Value Orientation Challenges to Authority Prior to Group Membership

Developmental Period	n	% of participants	Weighted % of Mentions ^b
Childhood	4	26.7	3.95
Early adolescence	7	46.7	11.72
Late adolescence	1	66.7	34.97
Young adulthood	1	66.7	31.47
Adult	4	26.7	11.22

Note.

^a N = 15. Refers to percentage of 15 respondents who mentioned this subcode relative to each developmental period.

^bWeighted percentages of total mentions related to each developmental period were computed to balance out the contributions of any one individual participant for any developmental period. Does not total to 100% because one participant did not report any relevant actions.

4.2 ASSOCIATED VALUES

Table 5 shows the number of subjects who associated each value with rule-, role- and value-orientated actions. The values associated with rule orientations – conformity, tradition, hedonism – are notably different to those associated with the value orientation. Value-orientation values are clustered in the self-transcendence (universalism, benevolence), self-enhancement (power, achievement), and openness to change (self-direction) value types (Schwartz, 1994). No participants associated the values of conformity, tradition, security, or hedonism with value-driven challenges to authority. When mentioned in rule orientations, these values were associated with situations and dynamics that the subjects perceived as

negative and something to be overcome. By contrast, the values that they associated with their formative, developmental experiences as activists reflect their communal, agentic, and change preoccupations.

Subjects often associated multiple values with a value-oriented action, particularly those actions undertaken while they were members of the group and adults (see Table 5 note). Prior to group membership, the values expressed by most subjects are self-direction and universalism; during group membership, universalism and self-direction are expressed by all subjects and power and achievement expressed by all but one subject (see Table 5). This suggests increasing integration of agentic and communal values over the lifespan, which is in keeping with previously mentioned studies on moral exemplars and moral integration (Frimer & Walker, 2009; Frimer et al., 2011, 2012).

Looking more closely at these values, we see that they support the concerns and goals of social heroes. The value most frequently associated with challenges to authority was self-direction. Self-direction's underlying motivation is independent thought, critical thinking and autonomy (Schwartz, 1994), which are necessary to redefine authority as illegitimate and respond accordingly (Kelman & Hamilton, 1989). Self-direction is conceptually close to the other-focused value of universalism, which was the next most frequently expressed value. Universalism describes an underlying motivation for the welfare of others and broader society (Schwartz, 1994), and speaks to these social heroes' preoccupations with protecting others beyond their immediate group. (Benevolence – concern with the wellbeing of one's close group/familiars – is quite low compared to universalism, suggesting that these social heroes' scope of concern extends well beyond than their immediate circle.) Next come the self-enhancing values of power and achievement. Achievement describes their motivations to be effective and successful in their actions to protect and defend people, principles and ideals (Schwartz, 1994). Power's motivational goal is described as control, status, dominance and

attainment of material wealth (Schwartz, 1994). However, VEiN sub-coding showed that these social heroes were not interested in power as wealth or material possessions. Many were, however, interested in “modifying other’s cognition/affect/behaviors” and “control over a social environment” (Frimer & Walker, 2009, p.5). Separately and in combination over their lifespans, their values of self-direction, universalism, power and achievement motivated these social heroes to challenge authority in order to effectively defend principles, people and ideals which they perceived to be both important and threatened.

Table 5

Number of Subjects Associating Each Value With an Orientation to Authority Action

Associated Values	Orientation to Authority			
	Rule	Role	Value	
			Prior to Membership	During Membership
Universalism ^a	-	-	12	15
Benevolence ^a	-	-	2	5
Conformity ^b	5	-	-	-
Tradition ^b	1	-	-	-
Security ^b	-	-	-	-
Power ^c	-	-	8	14
Achievement ^c	-	-	5	14
Hedonism ^{c, d}	1	-	-	-
Stimulation ^d	-	-	-	2
Self-Direction ^d	-	-	14	15

Note. N = 15. Value-orientation co-reporting of values: prior to membership M = 2.73, range 0-4; during membership M = 4.33, range 2-6.

The values in this table come from Schwartz' (1994) Values Circumplex, which is divided into sectors of opposing conceptual and empirical associations. These are:

^aSelf-Transcendence sector values: universalism, benevolence

^bConservation sector values: conformity, tradition, security

^cSelf-Enhancement sector values: power, achievement, hedonism

^dOpenness to Change sector values: hedonism, stimulation, self-direction

5 DISCUSSION

This study of social heroes applied an orientation to authority framework (Kelman & Hamilton, 1989; Kelman, 2006), universal values theory (Schwartz, 1992, 1994) and the values embedded in narrative methodology (VEiN; Frimer & Walker, 2009) to identify when value-driven behaviors suggestive of later social heroism first emerged in the lifespan of a sample of social heroes, and the motivational values associated with those behaviors. The study adopted a narrative approach to examine the lived experiences of a small group of LGBTQ activists and social heroes. All demonstrated a value orientation to authority, with value-oriented challenges to authority emerging early in their life spans.

The very specific demographic characteristics, small sample size, and lack of a comparison group limit the generalizability of these findings to a broader population. Their experiences and developmental trajectories most likely differ in some fundamental aspects to other types of social heroes. The potential for social desirability, exaggeration and minimization associated with self-reported data also limit generalizability, as do the limitations associated with retroactive construals of events. The interviews were conducted by non-psychologists with a different research agenda to the current study. However, while the subjects did not speak directly to the researcher's questions, they were also not asked questions which may have influenced their responses, thus helping to reduce bias. Moreover, despite these limitations, the interviews contained ample data embedded in the participants' life experiences and histories relevant to this study's research questions, which provide insights into the role of values in orienting and motivating these social heroes' behaviors over their lifespans. The study suggests incremental insights that enhance our understanding of social heroism, which may have implications for existing theories and future research.

All the exemplars in this sample acted on a value orientation to authority, and described their value-oriented challenges to authority as important developmental influences

in their developmental trajectory as activists and social heroes. This contrasts sharply with the findings for rule and role orientations: no participants mentioned acting on a role orientation; only five mentioned acting on a rule orientation. Tellingly, the participants also described these rule experiences as something that they had overcome, often through acting on their values. These subjects also made overwhelmingly more frequent value-orientation statements than role- or rule-oriented statements. Their narratives demonstrate that values played a consistent, central role in developing, motivating and guiding their path to social heroism, supporting the contention that these social heroes have a value orientation to authority. These findings echo those of other studies indicating the importance of values in motivating moral exemplars. Colby and Damon (1992) reported moral exemplars as being characterized by an unhesitating certainty about the right thing to do, based on their values and principles, and a study of Holocaust rescuers found that they responded to challenges to their fundamental ethical principles and values (Oliner & Oliner, 1988).

The values most frequently associated with their value-oriented challenges to authority were self-direction, universalism, power and achievement – both prior to group membership for more than half the sample, and during group membership for the vast majority of the sample (see table 5). These four values are highly relevant to social heroes' concerns and objectives, who are motivated to defend existing community values and principles which are threatened or ignored, to challenge established social practices and mores, and to establish new community values and principles (Franco et al., 2011). Self-direction's motivational goal of independent thought and action helped them to identify the need to challenge authority, and articulate new community values and practices – motivated by universalism's desire to protect the wellbeing of members of the larger society and environment. Power for these social heroes was not associated with the desire for material wealth. Instead, power lay in convincing others of their cause, and acting to protect existing

values and practices and establish new, more inclusive ones. Achievement was associated with the importance they placed on getting results and attaining objectives. Separately and in combination, these agentic and communal values were important motivators and trans-situational guides. Acting on them generated developmental experiences and exposed them to developmental influences which they considered critical contributors to their social heroism.

The 14 participants who reported early life experiences all described engaging in value-driven challenges to authority by late adolescence (four in childhood, seven in early adolescence, seven in late adolescence), suggesting that this orientation was central to their identity, and an early and important motivator of their behavior. In the dispositional-situational debate mentioned earlier, the dispositional perspective grounds heroism in moral character development and personality (Walker, 2017), while the situational perspective contends that ordinary people are capable of heroic action in the right circumstances (Franco et al., 2011; Zimbardo, 2007). If values emerge early in the lifespan, and important values – when activated – can motivate and guide behavior, this suggests a role for both situational and dispositional forces in social heroism (Walker, Frimer, & Dunlop, 2010). Insofar as values must be activated, situational characteristics may be primary. However, the emergence of value patterns in childhood suggests that disposition may also play an important role in the emergence of socially heroic behaviors through values activation and motivation. By late adolescence (and earlier for some), the social heroes in this study had acted in ways that foreshadowed and contributed to their later socially heroic behaviors. Early emergence of these behaviors may indicate a dispositional effect operating in their development as social heroes, as it suggests that their value-driven challenges to authority were innate to their person and central to their identity. It may be that dispositional forces are most important in social heroism, which often involves sustaining reflective engagement over time, whereas situational forces predominate in civil heroism, which requires responding opportunistically

to circumstances as they arise. Martial heroism may involve a more balanced blend of both forces.

Given the emergence and consistent presence of value-oriented challenges to authority in these social heroes' early life, what role might they have played in their developmental trajectory? Two theoretical concepts mentioned earlier – heroic imagination and heroic self-efficacy – may be involved. Recall that the heroic imagination is the mindset to respond heroically when need and opportunities arise, and the ability to envision new structural possibilities for social systems (Franco et al., 2011). Heroic self-efficacy requires a person to believe they possess the ability, skills and resources required to handle a situation requiring heroism (Csikszentmihalyi et al., 2017). To respond to a threat to social values, social heroes must develop a heroic imagination which is triggered by the need and opportunity for heroism. Once triggered, they must assess if they have the requisite heroic self-efficacy to respond to that need. Assuming they do, they must act. Insofar as value-oriented challenges to authority early in life help develop the heroic imagination and heroic self-efficacy, they may act as formative influences in developing social heroes' ability to act heroically.

How might a value-orientation to authority develop heroic imagination and heroic self-efficacy? Redefining an authority's actions as illegitimate requires assessing the contextual and moral characteristics of those actions to clarify how they violate one's important personal values; identifying the need and opportunity for a heroic response; and envisioning potential alternatives and responses. This process likely involves the activation of values including self-direction, universalism, power and achievement – separately and in combination. Motivated by self-direction and universalism, repetition of this process over time may develop the heroic imagination by enhancing and refining the ability to anticipate and identify needs and opportunities for social heroism, and articulate value-driven

alternatives. Motivated by achievement and power, repeated experiences challenging authority can develop a person's heroic self-efficacy, particularly if they have role models to learn from – what Colby and Damon (1992) described as the transformation of goals through social influence. When they later encounter situations calling for social heroism, it may be that their heroic imagination is sufficiently refined and primed to be triggered, and their heroic self-efficacy sufficiently developed, that they are willing and able to respond effectively as social heroes.

From an applied perspective, how can a value orientation to authority be developed from early childhood? One possible parenting approach is prosocialization, defined as *“parenting with the conscious intention of raising caring, morally courageous kids”* (Fagin-Jones, 2019, p. 11). Prosocialization is derived from the empirical research on moral exemplars (specifically, non-Jewish rescuers of Jews during the Holocaust; e.g., Oliner and Oliner, 1988), and is based on these exemplars' descriptions of how their parents raised them. From early in their development, their parents' influence helped them to establish those moral identities, predispositions and habitual behavior patterns that motivated and sustained their future heroic behavior (Fagin-Jones, 2019). Prosocialization parenting is concerned with developing secure attachments early in childhood, which support courageous action and risk-taking later in life; the development of empathic concern through other-oriented morality; and the use of inductive discipline focused on reasoning and explanation (Fagin-Jones, 2019). This approach to child rearing can provide a foundation and capacity for value-driven challenges to authority through the willingness to confront authority (courage and risk-taking); the motivation to help and protect others in need (empathic concern); and the capacity to define situations based on their inner-directed values (inductive discipline). In this way, prosocialization could help to develop a child's heroic imagination, heroic self-efficacy, and a value orientation to authority over the course of their childhood and adolescence.

This interaction between individual and circumstances echoes Callina et al.'s (2017) argument that heroic capability is developed through the interaction of individuals with their environments, as they learn from their experiences navigating, making sense of, and contributing to those environments. Value-oriented challenges to authority may be one such experience, which future research should investigate in a more demographically diverse sample of social heroes in order to identify their motivational values.

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7 CONFLICT OF INTEREST

The authors declare that the research was conducted in the absence of any commercial or financial relationships that could be construed as a potential conflict of interest.