BEYOND-PERSONALITY INVENTORY:
ARCHETYPES OF CHANGE-AGENT STYLE

John J. Coblentz

INTRODUCTION
Change is probably the most obvious constant in our universe. Proactive change agents face the challenge of becoming whole and balanced in various ways. This inventory addresses the challenge of experience beyond personality and can help to strengthen proactive behavior. The objectives of the instrument include the following:

1. To affirm qualities that have emerged most strongly in oneself;
2. To affirm qualities that have begun to emerge in oneself;
3. To affirm qualities that have the potential to emerge in oneself in the future; and
4. To assimilate and integrate qualities as values and to apply them to enhance one’s life.

The goal is to find the place in oneself where illusion (the dream) and reflection (the experience) meet in a new reality. Participants should be encouraged to free themselves from inhibitions in attempting to complete the inventory. There are no right answers and no wrong answers; each individual must try to determine what the truth is for himself or herself. A perfected self is not the goal; the quest is how to become whole, how to become a skilled practitioner of balance.

THE INSTRUMENT
The Beyond-Personality Inventory presents thirty terms, and definitions or viewpoints of meaning are supplied. These terms are divided into ten groups of three. The respondent assigns twelve points to each of the ten groups; the number assigned to each term should reflect the proportionate weight of the term when compared to the other two terms in its group. Respondents are allowed to refer to the viewpoints of meaning as they assign the numbers. All words have a continuum of meaning, and some extend from a very positive to a very negative definition. In completing the Beyond Personality Inventory, the respondent should view each term in light of its most positive meaning.
**Interpretation of Scores**

The assigned numbers are arrayed on a scoring sheet, where three archetypes of growth and development are presented: the “master,” the “saint,” and the “prophet.” An interpretation sheet, a profile sheet, an ideal profile for each archetype, and a work sheet for action plans are furnished.

**Validity and Reliability**

No reliability or validity data are available on the instrument, but it does have face validity. It can be used for the stated objectives and for planning action steps for turning desired qualities into reality.

**Administration**

The facilitator explains the objectives of the instrument and distributes the viewpoint of meaning sheet. The participants are asked to review the viewpoints but not to try to memorize the definitions because they will be allowed to refer to the sheet while they are completing the instrument.

After the participants have read the viewpoint of meaning sheet, the facilitator distributes the Beyond-Personality Inventory and explains that twelve points should be assigned to each group of three terms. The number assigned to each term should reflect the proportionate weight of that term when compared with the other two terms in the group. The highest number should be assigned to the term that the participant feels closest to at the present; the next highest number, to the term that the participant believes is emerging in his or her life; and the lowest number, to the term that seems most distant in the participant’s life. Zero may be used for one of the terms, but in no case should any two terms in a group be assigned the same number.

When the participants have completed the inventory, the facilitator distributes the scoring sheet. The participants are instructed to transfer their numbers from the inventory to the scoring sheet and to total the numbers in each of the three columns. The highest total is the primary path. If any column totals tie, a prioritized order should be addressed later on the work sheet.

After the scoring is completed, the facilitator distributes the interpretation sheet and all three profile sheets to every participant and instructs the group to read the interpretation sheet before reviewing the profiles.

When the participants have reviewed the three profile sheets, the work sheet is distributed. Participants work independently or in pairs or small groups to arrive at action plans. The ideal profiles are then distributed, and participants review them to determine whether their action plans need to be revised.
BEYOND-PERSONALITY INVENTORY VIEWPOINT OF MEANING

Instructions: The Beyond-Personality Inventory contains the following thirty terms. Although these terms may ordinarily have different meanings to different people, as you complete the inventory, please use the viewpoints provided below. Your present task is to quietly reflect on each word and the viewpoint given. Do not try to memorize these viewpoints; you will be allowed to refer to this sheet as you are completing the inventory.

**Becoming**  
The act of coming into existence; continuous emergence toward wholeness; the sense of moving in the whole fabric of being.

**Being**  
The state of existing or living; existing in wholeness; the sense of containing all the impulses of wholeness.

**Bridging**  
Providing a connection or transition across or between; showing an access to the next step; glancing in the mirror.

**Community**  
A group of people living in a particular location; a group of people who hold a common purpose.

**Compassion**  
A feeling of sorrow for the sufferings of others, accompanied by the urge to help; the act of dignifying the lowest emotion and the lowest thought, unconditionally, with love.

**Connectedness**  
The state of being joined, coupled, unified; the state of sharing and merging boundaries.

**Creating**  
Bringing into being, making, or originating; assembling, merging, or pruning for new purpose and meaning.

**Doing**  
Producing or being occupied; pursuing the work; living out the question; working to define wholeness.

**Empowerment**  
The act of authorizing, giving power to, and/or supporting the emergence of power in oneself or others.

**Enabler**  
One who provides opportunity; one who reflects the possible in the impossible.

**Healing**  
Making healthy again; curing disease; restoring ease; balancing elements toward wholeness.

**Inspiring**  
Stimulating or impelling to some creative or effective effort; casting light on the path; sparking the breath of wakefulness.

**Justice**  
The quality of being righteous, correct, impartial.

**Leader**  
A person who is the guiding head of a group or activity; one who guides from a perspective broader than those being led.

**Liberation**  
The securing of release; an unbinding; the reality of being free.
<table>
<thead>
<tr>
<th>Word</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Love</td>
<td>A deep and tender feeling of affection for a person or persons; the engagement of the highest emotion with the highest thought, unconditionally.</td>
</tr>
<tr>
<td>People</td>
<td>Human beings as a distinct group of creatures; persons who share the earth experience.</td>
</tr>
<tr>
<td>Person</td>
<td>An individual man, woman, or child; an individual in the earth experience.</td>
</tr>
<tr>
<td>Power</td>
<td>The ability to do, act, or produce; the capacity to activate energy.</td>
</tr>
<tr>
<td>Protector</td>
<td>A person who guards or defends; one who provides safety, nurturing, and care.</td>
</tr>
<tr>
<td>Provider</td>
<td>One who makes available; a supplier; one who meets needs.</td>
</tr>
<tr>
<td>Resisting</td>
<td>Opposing, retarding, or withstanding; holding to a value in order to maintain balance.</td>
</tr>
<tr>
<td>Self-Awareness</td>
<td>Alertness to one’s own sensations, feelings, or condition; acknowledging boundaries and potentials of oneself.</td>
</tr>
<tr>
<td>Self-Control</td>
<td>Control of one’s own emotions, desires, actions, the intentional activation of one’s own boundaries.</td>
</tr>
<tr>
<td>Self-Effacement</td>
<td>The practice of minimizing one’s own actions, of intentionally diminishing one’s own boundaries.</td>
</tr>
<tr>
<td>Servant</td>
<td>A person who performs services; one who manifests the act of giving.</td>
</tr>
<tr>
<td>Surrendering</td>
<td>Giving up, giving in, or yielding; letting go of boundaries in order to open the heart.</td>
</tr>
<tr>
<td>Teacher</td>
<td>A person who instructs; one who guides with a telescope, a microscope, and a mirror.</td>
</tr>
<tr>
<td>Truth</td>
<td>That which accords with reality; the highest reality in a formative universe.</td>
</tr>
<tr>
<td>Wisdom</td>
<td>The quality of following the soundest course of action, based on knowledge, experience, and understanding; the highest application of knowledge, experience, and understanding.</td>
</tr>
</tbody>
</table>
BEYOND-PERSONALITY INVENTORY

John J. Coblentz

Instructions: Keep in mind the definitions presented on the Viewpoint of Meaning sheet as you complete this inventory. Feel free to refer to that sheet to refresh your memory as you consider the ten groups of terms listed below. In every case, assume the most positive meaning of the term.

Divide twelve points among the three terms in each group by comparing each term with the other two. The number you assign to each term should reflect the relative weight of that term when you compare it with the other two terms in the group. Assign the highest number to the term to which you feel closest at the present; assign the next highest number to the term that you believe is emerging in your life; and assign the lowest number to the term that seems most distant in your life. You may assign zero to one of the terms in each group, but in no case should you assign the same number to two terms within the same group. For example, a person may want to assign the following points to the terms in the first group:

\[ \text{Truth} \_1 + \text{Wisdom} \_4 + \text{Justice} \_7 = 12 \]

1. Truth ____ + Wisdom ____ + Justice ____ = 12
2. Servant ____ + Leader ____ + Teacher ____ = 12
3. Bridging ____ + Surrendering ____ + Resisting ____ = 12
4. Creating ____ + Inspiring ____ + Healing ____ = 12
5. Love ____ + Power ____ + Connectedness ____ = 12
6. Self-Control ____ + Self-Effacement ____ + Self-Awareness ____ = 12
7. Liberation ____ + Compassion ____ + Empowerment ____ = 12
8. Protector ____ + Enabler ____ + Provider ____ = 12
9. Community ____ + Persons ____ + People ____ = 12
10. Doing ____ + Becoming ____ + Being ____ = 12

Total 120
BEYOND-PERSONALITY INVENTORY SCORING SHEET

*Instructions:* Transfer the numbers you assigned to each term in the Beyond-Personality Inventory to the appropriate spaces below. Then total each of the three columns.

<table>
<thead>
<tr>
<th></th>
<th>M</th>
<th>S</th>
<th>P</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Wisdom _____</td>
<td>Justice _____</td>
<td>Truth _____</td>
</tr>
<tr>
<td>2.</td>
<td>Leader _____</td>
<td>Servant _____</td>
<td>Teacher _____</td>
</tr>
<tr>
<td>3.</td>
<td>Resisting _____</td>
<td>Surrendering _____</td>
<td>Bridging _____</td>
</tr>
<tr>
<td>4.</td>
<td>Creating _____</td>
<td>Healing _____</td>
<td>Inspiring _____</td>
</tr>
<tr>
<td>5.</td>
<td>Power _____</td>
<td>Love _____</td>
<td>Connectedness _____</td>
</tr>
<tr>
<td>6.</td>
<td>Self-Control _____</td>
<td>Self-Effacement _____</td>
<td>Self-Awareness _____</td>
</tr>
<tr>
<td>7.</td>
<td>Empowerment _____</td>
<td>Compassion _____</td>
<td>Liberation _____</td>
</tr>
<tr>
<td>8.</td>
<td>Protector _____</td>
<td>Provider _____</td>
<td>Enabler _____</td>
</tr>
<tr>
<td>9.</td>
<td>People _____</td>
<td>Persons _____</td>
<td>Community _____</td>
</tr>
<tr>
<td>10.</td>
<td>Being _____</td>
<td>Doing _____</td>
<td>Becoming _____</td>
</tr>
</tbody>
</table>

**Totals**  
M = _____  
S = _____  
P = _____
BEYOND-PERSONALITY INVENTORY
INTERPRETATION SHEET

This inventory deals with three archetypes of growth and development. These archetypes, which represent change-agent styles, are referred to as “master,” “saint,” and “prophet.” Archetypes may be seen as reflections or mirrors of one’s identity at a given moment. Emerging from that mirror is the mythical or ideal image of the archetype. Archetypes are convenient compressions of identity, each of which represents particular groups of human behavior. They are not intended, however, to label individuals or place limitations on a person’s boundaries or potentials. Each of the archetypes presented here represents a different focus in the scheme of growth beyond personality, and together they form a unity, a wholeness, a completeness in the development of the higher self.

Life can be looked on as an interactive dance in which we sometimes feel independent, sometimes dependent, and sometimes interdependent. The dance toward personhood is led, in each of the archetypes, by a different partner; that is, by a different aspect of wholeness inherent in each person. These aspects are reflected in the last three groups of terms on the inventory. During a person’s life, he or she tends to be led more by one partner than by the other two.

On the answer sheet, the “M” column represents the master archetype; the “S” column, the saint archetype; and the “P” column, the prophet archetype. The column with the highest score is your primary path and indicates the archetype into whose mirror you tend to look most often. If any column totals tie, you may prioritize them on the work sheet in the order in which you prefer to begin working on them.

When you have discovered your primary path from your scoring sheet, examine the profile sheet that describes your primary path. Then review the other two profiles.
1. **Intelligence.** The highest value of the Master is wisdom, out of which flows the application of knowledge, experience, and understanding in order to embody the universal diversity of power in a higher purpose.

2. **Communication.** The Master is an acknowledged leader, promoting the welfare of people as a wise guide. The Master maintains an overview of the mission and selectively voices strategies to fulfill it.

3. **Proaction.** The Master chooses resistance as a means of centering. It is also used to administer power wisely. The Master knows what must be held in check and what must be released in order to accomplish the goals of the mission. Resistance is the Master’s kite string as he or she helps others to fly.

4. **Vision.** The Master is a creator in the sense that the capacity to empower is supported by the insight to assemble, merge, or prune in order to bring into view new purpose and meaning.

5. **Unconditional Testing.** Power is the Master’s strength, and that energy is felt, tested, questioned, affirmed, and reaffirmed by the Master. The ability and willingness to discern and acknowledge boundaries are special talents of the Master.

6. **Foundation.** The self-esteem of the Master is based on self-control. The Master is convinced that the keys to the kingdom can be turned by mastering all the elements of self and controlling them wisely.

7. **Emotion.** The Master is driven to use his or her power to empower others. This power is found in the furnace that fires the heart.

8, 9, and 10. **The Dance.** Led by the male-like partner in the dance, the Master is a protector of the mission—which belongs to the people. From this perspective, the Master has a sense of containing all the impulses of wholeness in the manifestation of being.
BEYOND-PERSONALITY INVENTORY
PROFILE SHEET FOR THE SAINT

1. **Intelligence.** The highest value of the Saint is justice, out of which flows a balanced energy in order to embody universal love.

2. **Communication.** The Saint is an acknowledged servant, promoting the welfare of people as a just guide. The Saint quietly offers strategies to fulfill the mission and helps to implement them.

3. **Proaction.** The Saint chooses surrendering as a means of centering. It is also used to give love and generate compassion throughout the universe. The Saint knows what must be sacrificed in order to accomplish the goals of the mission.

4. **Vision.** The Saint is a healer in the sense that the capacity for compassion is supported by the insight to restore, ease, or balance in order to achieve wholeness.

5. **Unconditional Testing.** Love is the Saint’s strength, and that energy is felt, tested, questioned, affirmed, and reaffirmed by the Saint. The ability and willingness to dissolve boundaries are special talents of the Saint.

6. **Foundation.** The self-esteem of the Saint is based on self-effacement. The Saint is convinced that the keys to the kingdom can be turned by sacrificing all the elements of self in the interest of being just.

7. **Emotion.** The Saint is driven to love others and to have compassion for them. This love is found in the furnace that fires the heart.

8, 9, and 10. **The Dance.** Led by the female-like partner in the dance, the Saint is a provider for the mission—which belongs to unending numbers of individual persons. From this perspective, the Saint has the sense of defining and doing what needs to be done to bring about wholeness.
BEYOND-PERSONALITY INVENTORY
PROFILE SHEET FOR THE PROPHET

1. **Intelligence.** The highest value of the Prophet is truth, out of which flows reality in order to embody oneness and universal connectedness.

2. **Communication.** The Prophet is an acknowledged teacher, promoting the welfare of people as a truthful guide. The Prophet senses the purpose and direction of the mission and courageously offers strategies to fulfill it.

3. **Proaction.** The Prophet chooses bridging as a means of centering. It is also used to generate liberation. The Prophet sees what must be known and what must be shared in order to accomplish the goals of the mission.

4. **Vision.** The Prophet inspires in the sense that his or her capacity to liberate is supported by the insight to cast light on issues and to spark the breath of wakefulness.

5. **Unconditional Testing.** Connectedness is the Prophet’s strength, and that energy is felt, tested, questioned, affirmed, and reaffirmed by the Prophet. The ability and willingness to network and expand boundaries are special talents of the Prophet.

6. **Foundation.** The self-esteem of the Prophet is based on self-awareness. The Prophet is convinced that the keys to the kingdom can be turned by discerning all the elements of self and by expression their truth.

7. **Emotion.** The Prophet is driven to connectedness in order to liberate others. This connectedness is found in the furnace that fires the heart.

8, 9, and 10. **The Dance.** Led by the child-like partner in the dance, the Prophet enables the mission—which belongs to the community. From this perspective, the Prophet has the sense of moving toward wholeness by becoming what he or she must become.
BEYOND-PERSONALITY INVENTORY
WORK SHEET

The three archetypal paths are not mutually exclusive. Each person is centered more in one than the others, but the interaction of all three is required for balance in becoming a full expression of one’s potential being. In this regard, the state of emergence is the state of balance. Intentionally attempting to be in balance will require you to let go of the items on which you scored highest (you are already confident about these), to not be concerned about your middle scores (trust in their emergence), and to focus on your lowest scores (risk giving them your attention).

In the spaces below, list the term to which you gave the lowest score in each of the ten groups.

Lowest-Scored Terms

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________
6. ________________________________
7. ________________________________
8. ________________________________
9. ________________________________
10. ________________________________

On your scoring sheet, circle these terms and try to determine if a pattern emerges. Now that you are aware of your primary path and also your lowest scores, prioritize the three archetypes, giving top priority to the one that has emerged the least (that is, the one on which you wish to focus) and the lowest priority to the one that has emerged the most.
Priorities

1. __________________________________
2. __________________________________
3. __________________________________

Giving attention to these elements does not mean using force to make them emerge. Using force, in fact, may produce a result opposite from that desired. For example, using force to acquire masterly qualities is likely to result in domination and then dependency. In the space below, write down some action steps for giving attention to your lowest-ranking terms. Then review the ideal profile sheet for your primary path (for example, if your primary path is Master, then review the Ideal Profile for the Prophetic, Saintly Master). Add any new action steps that the Ideal Profile inspires. Also read the Ideal Profiles of the other archetypes. In the Ideal Profiles, the dance for all three archetypes is the same.

Action Steps:
BEYOND-PERSONALITY INVENTORY
IDEAL PROFILE FOR THE PROPHETIC, SAINTLY MASTER

1. **Intelligence.** The prophetic, saintly Master’s highest value of wisdom is lifted to fruition by the drums of justice and the ring of truth.

2. **Communication.** The prophetic, saintly Master delivers wisdom in leadership by embracing the qualities of teacher and servant.

3. **Proaction.** The prophetic, saintly Master broadens choices of action by adding bridging and surrendering to the skill of resisting.

4. **Vision.** The prophetic, saintly Master sees that creative abilities are enhanced by the capacity to inspire others to create and by the necessity to mend tears in the fabric of wholeness.

5. **Unconditional Testing.** The prophetic, saintly Master models the appropriate use of power by acknowledging the power of connectedness and by discovering the power of love.

6. **Foundation.** The prophetic, saintly Master moderates the potential rigidity of self-control with self-awareness to provide flexibility of boundaries and with self-effacement to explore the expansion of boundaries.

7. **Emotion.** The prophetic, saintly Master shares the joy of empowerment when the furnace of his or her heart is also fired to yield liberation and compassion.

8, 9, and 10. **The Dance.** In this dance, people, persons, and community are waves in the ocean of oneness. The prophetic, saintly Master looks into the mirror of knowing and sees that it is a true reflection of himself or herself. Being, doing, and becoming are simultaneous facets of the same one.
BEYOND-PERSONALITY INVENTORY
IDEAL PROFILE FOR THE MASTERFUL, PROPHETIC SAINT

1. **Intelligence.** The masterful, prophetic Saint’s highest value of justice is lifted to fruition by the song of wisdom and the ring of truth.

2. **Communication.** The masterful, prophetic Saint delivers justice in serving by embracing the qualities of teacher and leader.

3. **Proaction.** The masterful, prophetic Saint broadens choices of action by adding bridging and resistance to the skill of surrendering.

4. **Vision.** The masterful, prophetic Saint sees that healing abilities are enhanced by the capacity to inspire others to heal and the ability to create new visions of wholeness.

5. **Unconditional Testing.** The masterful, prophetic Saint models the wholeness of love by acknowledging the strength of connectedness and by discovering the gentleness of power.

6. **Foundation.** The masterful, prophetic Saint grounds the flight of self-effacement with self-awareness to explore the flexibility of boundaries; and with self-control to provide a useful structure for boundaries.

7. **Emotion.** The masterful, prophetic Saint shares the peace of compassion when the furnace of his or her heart is also fired to yield liberation and empowerment.

8, 9, and 10. **The Dance.** In this dance, people, persons, and community are waves in the ocean of oneness. The masterful, prophetic Saint looks into the mirror of knowing and sees that it is a true reflection of himself or herself. Being, doing, and becoming are simultaneous facets of the same one.
BEYOND-PERSONALITY INVENTORY
IDEAL PROFILE FOR THE SAINTLY, MASTERFUL PROPHET

1. **Intelligence.** The saintly, masterful Prophet’s highest value of truth is lifted to fruition by the drums of justice and the song of wisdom.

2. **Communication.** The saintly, masterful Prophet delivers truth in teaching by assuming the qualities of servant and leader.

3. **Proaction.** The saintly, masterful Prophet broadens choices of action by adding both surrender and resistance to the skill of bridging.

4. **Vision.** The saintly, masterful Prophet sees that the ability to inspire is enhanced by the capacity to heal and the ability to create new visions of wholeness.

5. **Unconditional Testing.** The saintly, masterful Prophet models the truth of connectedness by demonstrating its power and by discovering the value of belonging in love.

6. **Foundation.** The saintly, masterful Prophet complements the potential inwardness of self-awareness with self-control to provide a useful structure for boundaries and with self-effacement to explore the expansion of boundaries.

7. **Emotion.** The saintly, masterful Prophet shares the ecstasy of liberation when the furnace of his or her heart is also fired to yield compassion and empowerment.

8, 9, and 10. **The Dance.** In this dance, people, persons, and community are waves in the ocean of oneness. The saintly, masterful Prophet looks into the mirror of knowing and sees that it is a true reflection of himself or herself. Being, doing, and becoming are simultaneous facets of the same one.
BURNOUT INVENTORY

Wm. Randolph Warley

BURNOUT AS ALIENATION FROM WORK

Much of the literature on burnout in the workplace suggests that the source of burnout is the individual who experiences it—that burnout is primarily an outcome of physical, psychological, and emotional exhaustion. However, it seems more likely that exhaustion is symptomatic rather than causal and that burnout is actually a form of alienation from one’s work (Kohn, 1976; Seeman, 1959, 1975; Warley, 1983). The Burnout Inventory is based on the view of burnout as alienation. The instrument incorporates three kinds of factors that play a critical role in the development of burnout: work-context factors, organizational factors, and alienation factors.

Work-Context Factors

The work context is a major contributor to burnout (Carroll & White, 1982). The following work-context factors linked to burnout were used in the construction of the Burnout Inventory and are based on those identified by Hackman and Oldham (1974, 1975), Hill (1975), Miller and Carey (1979), Vaugh (1975), and Warley (1983):

1. **Boredom**: The degree to which an employee feels that his or her work is monotonous, uninteresting, and dull;
2. **Upward Communication**: The degree to which an employee’s position requires direct communication with individuals in higher positions;
3. **Decision Influence**: The degree to which an employee’s position provides substantial opportunity for independent decisions and control in areas of personal responsibility;
4. **Growth Opportunities**: The degree to which an employee’s position provides opportunities for personal growth and development in work-related skills and/or knowledge;
5. **Personal Control**: The degree to which an employee’s position allows him or her to function autonomously;
6. **Salary**: The degree to which the salary an employee receives is appropriate compensation for the work required in the position;
7. **Task Identity**: The degree to which an employee’s position requires the completion of a whole and identifiable piece of work;
8. **Task Responsibility:** The degree to which an employee’s position demands personal accountability and responsibility for the tasks performed by the employee;

9. **Task Significance:** The degree to which an employee’s position has a substantial impact on the lives and work of others;

10. **Skill Variety:** The degree to which an employee’s position requires a variety of different activities and involves the use of many different skills and talents;

11. **Specialized Skills:** The degree to which an employee’s position requires a highly complex level of skill or expertise in a specialized area;

12. **Supervisor Support:** The degree to which an employee’s immediate supervisor supports the employee’s work efforts; and

13. **Work Load:** The degree to which an employee perceives his or her workload to be heavy, light, or satisfactory.

### Organizational Factors

In addition to the work-context factors, there are organizational factors or characteristics that influence employees’ behaviors, attitudes, and feelings with regard to their work. The importance of four of these factors in particular—effective leadership (Miner, 1980), planning (Branch, 1983; Steiner, 1979), policies and procedures, and organizational philosophy or mission (Peters & Waterman, 1982; Stonich, 1982)—is frequently discussed in both organizational research and popular literature. According to the literature, these four factors appear to influence job satisfaction; if they are not present in an organization, their absence may contribute to employee burnout. These factors, as used in the development of the Burnout Inventory, are defined as follows:

1. **Leadership Effectiveness:** The degree to which an employee perceives the organizational leadership as effective in terms of getting work done and inspiring excellence;

2. **Planning:** The degree to which an employee perceives that planning is an integral part of organizational processes;

3. **Clarity of Policies and Procedures:** The degree to which an employee perceives that organizational policies and procedures are clearly articulated and meaningful; and

4. **Organizational Philosophy/Mission:** The degree to which an employee perceives the organization’s philosophy/mission as guiding people’s work throughout the organization.
Alienation Factors

The third kind of factor used in the construction of the Burnout Inventory has to do with alienation. The alienation factors developed for the inventory are based on Seeman’s writings on worker alienation (1959, 1973). These factors are defined as follows:

1. **Meaninglessness:** An employee’s expectancy that his or her future will not be good in a current position or profession;
2. **Cultural Estrangement:** An employee’s assignment of low reward value to goals that are typically highly valued by the organization;
3. **Powerlessness:** An employee’s expectancy that his or her own behavior will not determine the outcomes or reinforcements that he or she seeks;
4. **Social Isolation:** An employee’s sense of exclusion or rejection;
5. **Work-Activity Estrangement:** The degree to which the activities and tasks of an employee’s position no longer bring the employee enjoyment or satisfaction; and
6. **Worker Alienation:** The degree to which an employee disassociates from a work identity to which he or she claims membership by virtue of practice, certification, or employment.

THE INSTRUMENT

Format

The Burnout Inventory consists of seventy-three statements that an individual evaluates on a six-point scale ranging from Strongly Disagree to Strongly Agree. The inventory statements incorporate the work-context, organizational, and alienation factors; responses to the statements reflect the individual’s total response to his or her work and its environment.

Scoring and Interpretation

Completing the inventory allows an individual to examine the three kinds of factors and thereby assess the likelihood that he or she will experience burnout in the present job. The results yield four scores. The first three are based on the respondent’s perceptions, and the fourth is the total burnout score. The following paragraphs describe the four areas in which scores are given:

1. **Perception of Job Content.** This scale measures how an individual experiences his or her job and its content: Do I perceive opportunities for advancement from my current position? Do I feel indifferent or excited about my work? Does my work have meaningful goals and a significant influence on others? Does my job provide me with a sense of responsibility? Does it include a reasonable work load? How do I view my opportunities for personal growth? How satisfied am I with my salary? How much
autonomy and power do I have to get things done? What visible outcomes do I see in my work? How do I perceive my activities and tasks? All these issues contribute to an individual’s perception of job content.

2. Perception of Immediate Supervisor. This scale measures how an individual perceives his or her relationship with the immediate supervisor: Do my supervisor and I communicate openly? Do I receive appropriate feedback from my supervisor? Does my supervisor support me in my work? Do I respect my supervisor? This relationship is one of the most important that an employee has; if it is positive, the likelihood of burnout is low.

3. Perception of the Organization. This scale measures how an individual perceives the general organizational environment: How well and how clearly does the organization put forth its philosophy or mission? Are the organization’s policies and procedures clearly articulated? Is the organization’s leadership effective in accomplishing its goals and objectives? Does planning take place and does it occur at all levels of the organization so that all employees are involved? This scale also measures an individual’s perception of the organization’s contributions to his or her work.

4. Overall Burnout. The fourth score combines the three perception scores into an overall evaluation of the individual’s potential for burnout in his or her current job.

After the instrument has been completed, the administrator distributes copies of the scoring sheet. After scoring, the participants are given copies of the interpretation sheet and are asked to read this sheet and to plot their scores on the continua. Subsequently, the administrator leads a discussion based on the content of the interpretation sheet, emphasizing that how each individual respondent perceives his or her work environment is reality for that person. Within the same organization and even the same work team, one person may view the work context and the organization as the best of all possible worlds, whereas another person may have an entirely different view. All perceptions must be viewed as legitimate.

The content of the interpretation sheet is based on generalizations. An individual respondent may or may not be able to relate to all the characteristics given in a particular description. If respondents express concerns about any of their scores in a particular category (Perception of Job Content, Perception of Immediate Supervisor, or Perception of the Organization), the administrator should suggest that they examine the individual statements that comprise that category.

Validity, Reliability, and Suggested Uses

No validity or reliability data are available on the Burnout Inventory, but it does have face validity and is best used as a tool for examining burnout potential so that follow-up action planning can be done. The inventory may be used to establish a group burnout assessment of a department or a work team. Each member of the department or team responds to the instrument; then the scores are aggregated, divided by the number of
respondents, and interpreted for the group. Individual items may be examined for identification of problem areas.

REFERENCES AND BIBLIOGRAPHY


Miller, J.O., & Carey, S.D. (1979). Defining roles and work dimensions as a function of selected complementary categories with complex organizations. Unpublished manuscript, Educational Studies Division, Emory University, Atlanta, GA.


BURNOUT INVENTORY

Wm. Randolph Warley

Instructions: For each of the seventy-three statements in this inventory, refer to the following scale and decide which option corresponds to your level of agreement with the statement. Then write the letter(s) representing your level of agreement in the blank beside the statement. For example, if you moderately disagree with the first statement, you would write MD in the blank beside that statement.

Strongly Disagree Disagree Moderately Disagree Moderately Agree Agree Strongly Agree
SD D MD MA A SA

_____ 1. I have many chances for learning new and interesting things in my work.

_____ 2. The policies and procedures of this organization are well articulated.

_____ 3. My pay is inadequate for the work I do.

_____ 4. My work has visible outcomes; I can see how it fits with the whole of the organization.

_____ 5. Planning contributes directly to the ongoing activities of this organization.

_____ 6. Communications with key people at work are difficult for me.

_____ 7. I have enough power to accomplish my objectives in my current position.

_____ 8. I feel indifferent about my work.

_____ 9. I have freedom in scheduling my work.

_____ 10. Even if I did a poor job in my work, I would receive little or no criticism about it.

_____ 11. Because there is no future in my present position, I will probably seek another position.

_____ 12. The leadership of this organization inspires excellence.
<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Moderately Disagree</th>
<th>Moderately Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The activities and tasks of my work bring me little or no enjoyment or satisfaction.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Management involves me in the decisions that influence my work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My immediate supervisor is very supportive of my work efforts.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The planning done in this organization reflects the input of most employees.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I cannot make up my mind about whether the goals of my job are important to me.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My work has little or no influence on the lives or work of others.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I have more work than I can handle effectively.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My immediate supervisor seldom gives me information about my work performance.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I feel a high level of self-motivation to do my work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>This organization’s policies and procedures are objective and workable.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I am leaving my job as soon as possible.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My work has clear beginnings and endings.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I feel inadequately compensated for my work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The organization’s philosophy/mission is clearly reflected in the way work is carried out.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I have no power to accomplish my objectives in my current position.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My work is interesting.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>My future is limited in my current position.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>The leadership of this organization is competent.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>_____</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I frequently feel that my work does not make any difference to anyone.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
32. The activities and tasks of my work bring me only moderate enjoyment or satisfaction.

33. I control how my work is performed.

34. The day-to-day activities of this organization are supported by timely planning.

35. The goals of my job are very important to me.

36. I do not have enough work to do.

37. My immediate supervisor is antagonistic toward me.

38. I no longer want to be associated with my colleagues at work.

39. This organization’s policies and procedures are flexible enough to allow attainment of goals.

40. I have great respect for my immediate supervisor’s capabilities.

41. I lack the inner drive to do my work effectively.

42. I cannot make up my mind about whether I should leave my job.

43. This organization has a well-articulated philosophy/mission that guides employees in their work.

44. When management is considering a change in my areas of responsibility, I am consulted.

45. I have insufficient power to accomplish my objectives in my current position.

46. The organization’s mission is vague.

47. I have opportunities for personal growth and development in my work.

48. My future is good in my current position.

49. In this organization, planning involves most employees.
<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Moderately Disagree</th>
<th>Moderately Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SD</td>
<td>D</td>
<td>MD</td>
<td>MA</td>
<td>A</td>
<td>SA</td>
</tr>
</tbody>
</table>

_____ 50. The activities and tasks of my work bring me both enjoyment and satisfaction.

_____ 51. The leadership of this organization is effective.

_____ 52. The goals of my work are no longer important to me.

_____ 53. My work load is about right.

_____ 54. I have a clear sense of being personally accountable for the quality and quantity of work that I do.

_____ 55. Even when given the opportunity, I have little association with my colleagues at work.

_____ 56. The philosophy of this organization creates a positive work environment.

_____ 57. I am committed to my work.

_____ 58. Communication between me and my immediate supervisor is good.

_____ 59. My work is part of a process with no identifiable beginning and end.

_____ 60. The leadership of this organization needs much improvement.

_____ 61. In this organization, policies and procedures support individual effort.

_____ 62. My work has substantial impact on the lives or work of others.

_____ 63. There are few prospects for personal growth and development in my work.

_____ 64. I have a satisfactory level of autonomy in my work.

_____ 65. Management makes decisions about my work without seeking my advice.

_____ 66. I receive appropriate compensation for the work I do.

_____ 67. I receive sufficient feedback from my supervisor about my work performance.
_____ 68. It is difficult to get my work done, because my supervisor is seldom available for consultation.

_____ 69. When given the opportunity, I actively associate with my colleagues at work.

_____ 70. I would prefer working for someone else other than my immediate supervisor.

_____ 71. The mission of this organization is clearly defined.

_____ 72. My work is boring.

_____ 73. My supervisor provides me with enough information to do my work.
BURNOUT INVENTORY SCORING SHEET

Instructions:
1. The numbers in sections A, B, and C below correspond to the item numbers in the Burnout Inventory. In the blanks below, write the numerical values of your responses to the items. Your responses will have different values, depending on the items:

   - If the item number shown below is **boldface** and circled, your responses have the following values:
     \[
     SD = 6; \quad D = 5; \quad MD = 4; \quad MA = 3; \quad A = 2; \quad SA = 1
     \]
   
   Go through sections A, B, and C below and write in the values of your responses for all the items that are boldface and circled.

   - The responses for the remaining (uncircled) items have the following values:
     \[
     SD = 1; \quad D = 2; \quad MD = 3; \quad MA = 4; \quad A = 5; \quad SA = 6
     \]
   
   Go through sections A, B, and C again and write in the values of your responses for the remaining (uncircled) items.

2. For each of sections A, B, and C, add up all your responses to obtain your **total score**.

3. For each of sections A, B, and C, divide the total score by the number indicated to obtain your **average score**.

4. To arrive at your **overall burnout score**, follow the formula presented in section D.

A. Perception of Job Content

25. _____ 27. _____ 28. _____ 29. _____ 31. _____ 32. _____ 33. _____ 
35. _____ 36. _____ 38. _____ 41. _____ 42. _____ 45. _____ 48. _____ 
50. _____ 52. _____ 53. _____ 54. _____ 55. _____ 57. _____ 59. _____ 
62. _____ 64. _____ 66. _____ 69. _____ 72. _____ 

Total Score __________ ÷ 40 = __________ Average Score
**B. Perception of Immediate Supervisor**

10. _____ 15. _____ 20. _____ 37. _____ 40. _____ 58. _____ 67. _____

68. _____ 70. _____ 73. _____

Total Score __________ \( \div 40 = \) __________ Average Score

**C. Perception of the Organization**


26. _____ 30. _____ 34. _____ 39. _____ 43. _____ 44. _____ 46. _____

47. _____ 49. _____ 51. _____ 56. _____ 60. _____ 61. _____ 63. _____

65. _____ 71. _____

Total Score __________ \( \div 40 = \) __________ Average Score

**D. Overall Burnout**

Use the total scores for sections A, B, and C (before division) to calculate your overall burnout score. Add the total score for A to three times the total score for B; then add the score for C and divide the total by 93.

\[
(A)\text{________} + (3 \times B)\text{________} + (C)\text{________} = \text{_______} \div 93 = \text{_______}
\]

**Overall Burnout Score**
BURNOUT INVENTORY INTERPRETATION SHEET

Your Average Scores in the Perception Categories

Scores below 3 indicate a high potential for experiencing burnout. If your average scores fall in this range, your work life is unfulfilling for you. Serious attention and action on your part are warranted if you want to experience any level of fulfillment in your work life.

Scores in the 3-to-4 range indicate a degree of satisfaction that can be very deceiving. If your average scores are in this range, you are experiencing an ambiguous state that is neither fulfillment nor burnout. Your work life is neither so great that you love it nor so bad that you feel compelled to leave it. You may perceive things as being “O.K.”; therefore, you may not be motivated to change. However, you might want to consider making some changes to make your work life a more positive experience for you.

Scores approaching 5 or 6 indicate a work life that is exciting and fulfilling. If your average scores fall in this range, any “down” times that you experience are infrequent and short lived. Nevertheless, you might want to check back through the inventory to pinpoint specific items that you evaluated at a level that you consider unacceptable; then you can plan action to take to address those items.

The following paragraphs describe the perception categories in which you received scores.

Perception of Job Content

Your perception of the content of your job is based on three elements:

1. How you see yourself in your job. Do you see yourself as a flunky or as an important contributor to your organization’s goals and objectives? Or do you have a high-paying job that is dull and uninteresting?

2. How you feel about the work you do. Your feelings about your work are closely tied to, but still different from, your image of yourself in your job. For example, you may see yourself as a flunky but still enjoy and feel good about your work.

3. Whether and how much you enjoy the tasks and activities of your job. Do you enjoy performing your day-to-day activities at work? Are your tasks the types of things you typically like to do?

4. Whether and to what degree your job is right for you. You may perceive your organization as fine, your supervisor as supportive, and your work as enjoyable, but the job still may not be right for you. Because of surrounding favorable conditions, you may not see a level of dissatisfaction with your job that could eventually lead to burnout. If the working environment is good and there is a mismatch between you and the job, you will experience boredom or apathy about your job. This means that you have limited
fulfillment from what you are doing. An average score of 3 in this category would indicate this condition and would warrant further examination of current feelings about the job.

Your feelings about your job content may be complex. For instance, you may enjoy your work but feel that your job does not fit your self-image. Conversely, the content of your job may be unpleasant to you, but you may feel that the job makes a positive difference in people’s lives; thus, your work may seem worthwhile to you. However, it is important to realize that work that you perceive as unpleasant or inappropriate in some way may eventually cause you to experience burnout.

Plotting your score with an X on the following continuum will give you a general idea of how you experience the content of your job:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low job-content satisfaction</td>
<td>High job-content satisfaction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Perception of Immediate Supervisor

Your relationship with your immediate supervisor is one of the most important relationships, if not the most important, that you have in the organization. Without the support of your supervisor, your work day can be very unpleasant, leading to dissatisfaction and burnout. Good communication is the key to a good relationship with your supervisor. Receiving appropriate feedback and complete information can make even the most difficult job much easier. How you view your relationship and your communication with your supervisor is closely related to the satisfaction you derive from your work.

Plot your score with an X on the following continuum to obtain an idea of how you perceive your relationship with your immediate supervisor:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor relationship with supervisor</td>
<td>Good relationship with supervisor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Perception of the Organization

Every organization has a mission that incorporates its philosophy. The philosophy and mission of your organization create an environment that may or may not be compatible with your personal values, philosophy, and mission. If these two sets of values, philosophy, and mission are incompatible, then you will be uncomfortable in the organizational environment. Unfortunately, not every organization articulates its philosophy and mission clearly; when this is the case, ambiguity about what the organization is trying to accomplish can also lead to burnout.
The organization’s philosophy and mission are reflected in its policies and procedures, both written and unwritten. Thus, clear policies and procedures are important in creating a supportive work environment. When you are certain about what the organization expects, you know what management perceives as appropriate or inappropriate. Whether you agree or not, your knowledge of what is expected creates a certain security that ambiguity cannot. Similarly, good, effective leadership gives you direction and clarity in your work and contributes to the likelihood of a clearly articulated philosophy and mission.

Plot your score with an X on the following continuum to illustrate your perception of your organization:

1 2 3 4 5 6

Nonsupportive organization  Supportive organization

**Overall Burnout Score**

Your overall burnout score is an indication of your potential for burning out on the job. You may already be burned out, or you may be headed for burnout sometime in the future. In either case you need to examine inventory items that indicate dissatisfaction or lack of fulfillment (ones that indicate a negative perception that you agreed with and ones that indicate a positive perception that you disagreed with). Examining specific statements in this way will tell you the sources of your potential or existing burnout.

In some cases you may be able to change the situation. In other cases you may be unable to change the situation because the source of your burnout is beyond your control. However, even in situations that appear to be out of your control, you may find that some creative thinking and negotiating will go a long way toward improving your level of satisfaction and fulfillment.

Plot your overall burnout score on the following continuum:

1 2 3 4 5 6

Burning or burned out  High job satisfaction and fulfillment
Maslow’s construct of the self-actualizing person has been truly seminal in contemporary humanistic psychology. Inspired by his admiration for two of his teachers, Ruth Benedict and Max Wertheimer, Maslow began a study of those characteristics that differentiated the “most remarkable human beings” from ordinary persons. He reviewed the lives of many people, famous and unknown, living and dead, to discover the behaviors that led some human beings to a pattern of excellence in everyday living. His belief in the human capacity to grow in grace and quality shaped the “third force” in psychology, the force that energized the human potential movement.

Maslow never arrived at a precise definition of self-actualization. He viewed it as an ongoing process that involved the “full use and exploitation of talents, capacities, potentialities, etc. Such people seem to be fulfilling themselves and to be doing the best that they are capable of doing...” (Maslow, 1970, p. 150). Self-actualizing people were seen as free of neurotic, psychopathic, or psychotic tendencies; their basic needs for safety, belongingness, love, and self-respect were gratified. Self-actualization is not necessarily to be equated with fame or achievement. The genius of the self-actualizing person is poured into his or her everyday life. The self-actualizing person is virtuous, in the old sense.

Maslow compiled a list of the virtues of the self-actualizing person that described attitudes, behaviors, and characteristics of the person in the process of developing to his or her full stature. Self-actualizing persons are not saints. They have many of the “lesser human failings. They can be boring, stubborn, irritating. They are by no means free from a rather superficial vanity, pride, partiality to their own productions, family, friends and children” (Maslow, 1970, p. 175). In contrast to others, however, the self-actualizing person is aware of his or her imperfections, owns them, and makes choices about keeping or overcoming the undesirable traits.

In his later writings, Maslow described a life situation beyond self-actualization, in which individuals developed the capacity to transcend their usual experience. These “theory Z” persons are seen as differing in degree from self-actualizing persons, or “theory Y” types (Maslow, 1971b).
INVENTORY OF SELF-ACTUALIZING CHARACTERISTICS

The Inventory of Self-Actualizing Characteristics (ISAC) is based directly on Maslow’s descriptions of the self-actualizing person. It is designed for two purposes: to teach in some detail the concept of self-actualization and to provide participants in training affiliations with a device for measuring their ongoing self-actualizing process. As a self-feedback instrument, the ISAC can be used in any training situation in which a focus on self-appraisal, personal growth, or individual goal setting is desired.

The ISAC consists of seventy-five items, five derived from each of Maslow’s fifteen characteristics of self-actualizing persons. Users of the ISAC are asked to decide to what degree each item is accurate or true for them at the current time:

- **N** (not at all, definitely untrue for me);
- **O** (occasionally this is true of me—at least 25 percent of the time);
- **F** (frequently this is an accurate description of me—about 50 percent of the time);
- **M** (most of the time this would be descriptive of me);
- **H** (highly characteristic, definitely true for me).

Each response is weighted from a –2 to a +2, giving a possible range of –10 to +10 for each characteristic.

Administration

Instructions are printed on the ISAC. Approximately twenty minutes is required to complete the inventory. Two points should be stressed when the Inventory of Self-Actualizing Characteristics is introduced.

1. Self-actualization refers to a process, not to a fixed state of being. It is a way of experiencing the world; as Maslow says, “self-actualization means experiencing fully, vividly, selflessly with full concentration and total absorption...at the moment of experiencing, the person is wholly and fully human” (Maslow, 1971a, p. 45). This present-centeredness (living in the here-and-now) is a continuous event. The ISAC is designed to measure the extent to which the participant is involved in the self-actualizing process.

2. The ISAC consists of positive statements. The “social desirability” of each item is, in most instances, obvious. The instrument easily can be faked; the ISAC yields useful information only when the participant is candid and honest.

Scoring

Participants transfer their letter scores for each item to the ISAC Score Sheet. For instance, the first characteristic, efficient reality perception, is composed of items 4, 25, 27, 36, and 73. The letter responses to those items are written in the score box.
After all letter responses have been transferred, a numerical value is given to each:

\[ N = -2 \]
\[ O = -1 \]
\[ F = 0 \]
\[ M = +1 \]
\[ H = +2 \]

A total score for each characteristic is derived algebraically by adding the numerical values. Score possibilities range from \(-10\) to \(+10\). Total scores are transferred to the ISAC Profile Sheet for easy interpretation.

**Interpretation**

Scoring is devised so that a score of zero reflects the hypothetical “average” person’s ownership of the characteristic. The zero score means that approximately half of the time the person develops the self-actualizing characteristic.

Minus scores indicate that the participant thinks he or she lacks that particular self-actualizing characteristic. Minus scores indicate an area for practice and growth.

Positive scores indicate that the participant thinks he or she is engaged in a self-actualizing process in terms of that characteristic.

**Group Activities Using the ISAC**

Several small-group activities could follow after the administration of the ISAC:

1. Pairs or small groups could share ISAC profiles to attempt to reach consensual validation.
2. Persons with similar low or high scores could be grouped to discuss goal setting, contracting, etc.

**REFERENCES**


INVENTORY OF SELF-ACTUALIZING CHARACTERISTICS (ISAC)

Anthony G. Banet, Jr.

This inventory is designed to give you information about your personal characteristics. Some items reflect concrete behavior, other items are traits or descriptions, and still others are statements of belief or value. Use the inventory to give yourself information about how you view yourself now, not how you would like to be.

Instructions: As you read each item, decide whether the sentence is true or descriptive of you. Answer each item by writing in the letter that most accurately reflects your decision:

N — Not at all, definitely untrue for me.
O — Occasionally this is true of me—at least 25 percent of the time.
F — Frequently this is an accurate description of me—about 50 percent of the time.
M — Most of the time this would be descriptive of me.
H — Highly characteristic, definitely true for me.

_____ 1. I meet the needs of other people.
_____ 2. I have fun.
_____ 3. Respecting others is important to me.
_____ 4. My perception of people and situations is accurate.
_____ 5. I know what my biases are.
_____ 6. I like to be a playful child.
_____ 7. Loyalty to my friends is important to me.
_____ 8. My daily life is full of surprises.
_____ 9. I do not need other people.
_____ 10. Class distinctions are unimportant to me.
_____ 11. I am a responsible person.
_____ 12. I like to share myself with others.
_____ 13. I can see the humorous side of serious matters.
N — Not at all, definitely untrue for me.
O — Occasionally this is true of me—at least 25 percent of the time.
F — Frequently this is an accurate description of me—about 50 percent of the time.
M — Most of the time this would be descriptive of me.
H — Highly characteristic, definitely true for me.

____ 14. I express my anger clearly and directly.
____ 15. I accept my strengths.
____ 16. I avoid doing what I believe is wrong.
____ 17. I strive to keep my life simple and natural.
____ 18. I am rarely lonely.
____ 19. I enjoy my own absurdity.
____ 20. Racial and national differences interest me.
____ 21. Every day is different for me.
____ 22. I delight in learning new things.
____ 23. I can give to others and expect no return.
____ 24. Nothing is routine for me.
____ 25. I think clearly.
____ 26. I believe the end never justifies the means.
____ 27. I can tolerate chaos and disorder.
____ 28. Working toward a goal is more enjoyable than attaining it.
____ 29. I am amused by much of what I experience.
____ 30. I like to be myself.
____ 31. I am untroubled by problems with authority.
____ 32. I experience no pressure to conform to social norms.
____ 33. I accept my limitations.
N — *Not at all*, definitely untrue for me.
O — *Occasionally* this is true of me—at least 25 percent of the time.
F — *Frequently* this is an accurate description of me—about 50 percent of the time.
M — *Most of the time* this would be descriptive of me.
H — *Highly characteristic*, definitely true for me.

_____ 34. The meaning of my life is clear to me.
_____ 35. I enjoy discussing philosophical issues.
_____ 36. I know the difference between what I want and what I need.
_____ 37. I tolerate other people’s faults and shortcomings.
_____ 38. My life has a definite purpose.
_____ 39. My major satisfactions come from within.
_____ 40. I can let go of my own interests.
_____ 41. Art, music, and beautiful things strengthen and enrich me.
_____ 42. I believe that supernatural phenomena occur.
_____ 43. I see the positive side of things.
_____ 44. I can make myself at home anywhere.
_____ 45. I have had experiences when I lost my sense of space and time.
_____ 46. I am my own person.
_____ 47. I am aware of the mysterious aspect of life.
_____ 48. Achievement is less important to me than contentment.
_____ 49. I am rarely self-conscious.
_____ 50. Empathy comes easy for me.
_____ 51. I can let things happen without planning.
_____ 52. I do original work.
_____ 53. I know the pain and joy of closeness.
N — *Not at all, definitely untrue for me.*
O — *Occasionally* this is true of me—at least 25 percent of the time.
F — *Frequently* this is an accurate description of me—about 50 percent of the time.
M — *Most of the time* this would be descriptive of me.
H — *Highly characteristic,* definitely true for me.

_____ 54. I prize the dignity of all persons.
_____ 55. I am patient with others.
_____ 56. I like to be sexually close to others.
_____ 57. I am an uninhibited person.
_____ 58. Dress and style are unimportant to me.
_____ 59. I have definite moral standards.
_____ 60. I take good care of myself.
_____ 61. I learn something new every day.
_____ 62. I am excited by experimentation and risk taking.
_____ 63. I believe that all human beings are members of one, big family.
_____ 64. My actions are based on my choices, not on needs.
_____ 65. I rarely censor my thoughts.
_____ 66. I can’t disengage myself from petty concerns.
_____ 67. I am a spiritual person (though not necessarily religious).
_____ 68. I am rarely defensive.
_____ 69. I learn from many different places and persons.
_____ 70. I am never bored.
_____ 71. I am at ease with cultural traditions different from my own.
_____ 72. I have intense inner experiences.
_____ 73. Determining what is real and what is phony is easy for me.
N — *Not at all*, definitely untrue for me.
O — *Occasionally* this is true of me—at least 25 percent of the time.
F — *Frequently* this is an accurate description of me—about 50 percent of the time.
M — *Most of the time* this would be descriptive of me.
H — *Highly characteristic*, definitely true for me.

_____ 74. I am objective about most things.
_____ 75. I feel kinship with most people I meet.
ISAC SCORE SHEET

*Instructions:* Transfer your letter responses from the ISAC to each of the fifteen scales below and write in the value for each response:

- N = –2
- O = –1
- F = 0
- M = +1
- H = +2

Sum the values of the items in each scale for a score.

### Scale

1. **Efficient Reality Perception**

<table>
<thead>
<tr>
<th>Items</th>
<th>Letter Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>25</td>
<td>27</td>
</tr>
</tbody>
</table>

2. **Acceptance of Self, Others, Human Nature**

<table>
<thead>
<tr>
<th>Items</th>
<th>Letter Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>33</td>
<td>37</td>
</tr>
</tbody>
</table>

3. **Spontaneity, Simplicity, Naturalness**

<table>
<thead>
<tr>
<th>Items</th>
<th>Letter Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>24</td>
<td>48</td>
</tr>
</tbody>
</table>

4. **Problem Centeredness**

<table>
<thead>
<tr>
<th>Items</th>
<th>Letter Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>35</td>
<td>38</td>
</tr>
</tbody>
</table>

5. **Detachment and Privacy**

<table>
<thead>
<tr>
<th>Items</th>
<th>Letter Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>18</td>
<td>30</td>
</tr>
</tbody>
</table>

6. **Autonomy and Independence of Culture and Environments**

<table>
<thead>
<tr>
<th>Items</th>
<th>Letter Value</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>39</td>
<td>44</td>
</tr>
<tr>
<td></td>
<td>7. Freshness of Appreciation</td>
<td>12. Ethical Standards</td>
</tr>
<tr>
<td>---</td>
<td>------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>21 41 43 61 70</td>
<td>letter</td>
<td>value</td>
</tr>
<tr>
<td>8. Capacity for Peak Experiences</td>
<td>13. Unhostile Sense of Humor</td>
<td></td>
</tr>
<tr>
<td>42 45 47 67 72</td>
<td>letter</td>
<td>value</td>
</tr>
<tr>
<td>23 50 54 63 75</td>
<td>letter</td>
<td>value</td>
</tr>
<tr>
<td>10. Interpersonal Relations</td>
<td>15. Resistance to Enculturation</td>
<td></td>
</tr>
<tr>
<td>7 12 53 55 56</td>
<td>letter</td>
<td>value</td>
</tr>
<tr>
<td>11. Democratic Character Structure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 5 10 11 14</td>
<td>letter</td>
<td>value</td>
</tr>
</tbody>
</table>
ISAC PROFILE SHEET

Instructions: Enter your total score for each ISAC scale in the box provided and then chart each score at the appropriate point on the graph.

1. Efficient Reality Perception
Perceiving the real world accurately; making correct discriminations between the real and the spurious; capacity to deal with facts rather than opinions and wishes; appreciation of the unknown as a source for new learning; willingness to let go of the familiar; lack of obsessiveness.

2. Acceptance of Self, Others, Human Nature
Acceptance of body and physiological functions; prizing personal strengths; tolerating inadequacies in oneself and others; lack of defensiveness; a relative lack of overriding guilt, shame, or anxiety; dislike of pretense in self and others; uncritical, understanding view of oneself and others.

3. Spontaneity, Simplicity, Naturalness
Motivated by choice rather than need; in touch with inner feelings and an ability to communicate those feelings effectively to others; an ethical code that is individualized rather than conventional; interest in personal growth and development; appreciation of the simple and unpretentious.

4. Problem Centeredness
Ability to focus on problems outside the self; lack of self-consciousness; task oriented; ability to attend to the needs of others; lack of obsessive introspection; concern with basic questions and philosophical issues.
5. Detachment and Privacy
Liking solitude and time alone more than the average person; reliance on personal judgments; self-determined; objective; power of focusing and concentration; relationships based on choice rather than on need, dependence, or manipulation.

6. Autonomy and Independence of Culture and Environments
Independent of material things or opinions of others; self-motivated; disregard of social rewards or prestige; stability in the face of frustrations and adversity; maintaining inner serenity.

7. Freshness of Appreciation
Capacity for wonder and awe; richness of inner experience; perceiving familiar things as fresh and new; lack of boredom or jadedness; focus on the positive aspects of experience; “original mind”; responsive to beauty.

8. Capacity for Peak Experiences
Capable of intense, transcendent experiences; ability to experience ecstasy, to move beyond space and time; ability to live in a realm of being and beauty; loss of sense of self; experience of opening up to reality and beyond; capacity to be strengthened and enriched by such experiences.

9. Gemeinschaftsgefühl
Feelings of identification, sympathy, and affection for all human beings; desire to be of help to mankind; a posture of forgiveness; a belief that humanity is a large family.
10. **Interpersonal Relations**  
Capacity for intimacy and closeness; capable of great love for others; affection toward many people; choice of a small circle of true, loyal friends; concern for the welfare of others; appropriate anger.

11. **Democratic Character Structure**  
Belief in the dignity of all persons; relatively free from biases of class, education, political or religious beliefs, race or color; focus on character rather than on physical aspects of other persons; avoidance of scapegoating; clarity about personal anger and its target.

12. **Ethical Standards**  
Strong ethical sense, definite moral standards; clear notion of right and wrong; seeking to do right and avoiding wrongdoing; fixed on ends rather than means.

13. **Unhostile Sense of Humor**  
Sense of humor devoid of hostility, rebellion, or patronizing manner; capacity to laugh at oneself; appreciation of the ridiculous and the absurd; capacity for playfulness.

14. **Creativeness**  
Creativity in everyday life, rather than in artistic endeavors; ability to perceive the true and the real more than others; creativity that is childlike and playful; having fewer inhibitions or restrictions.
15. Resistance to Enculturation
Detachment from the conventional; lack of distortion around authority and authority figures; transcending racial or national distinctions; unconcerned about what is fashionable or chic; ability to live with and to learn from many cultural influences

Score –10 –5 0 +5 +10

SUGGESTED READINGS
THE INVOLVEMENT INVENTORY

Richard Heslin and Brian Blake

The Involvement Inventory is the outgrowth of the first author’s curiosity about some differences among his wife, his friends, and himself. The differences at first appeared to involve whether people approached life in an active or passive way. However, the differences became more complex when we looked carefully at the people and their orientations. Plato’s threefold view of people seemed to be relevant to the active-passive orientations. Plato described three kinds of people: philosophers, warriors, and the rest of us. The philosophers were concerned with intellect, the warriors with courage and will, and the rest with self-gratification. In current terminology, these emphases are roughly analogous to cognition (ideas), motivation (getting things done), and emotions (feelings).

In order to measure these orientations, statements were written to indicate an active orientation regarding feelings and interpersonal involvement, that is, an open, expressive, extroverted manner. Statements also were written to measure an active orientation toward objects and the material world, that is, a task-accomplishing, project-completing manner. Finally, statements were written that described a person who was very active in approaching ideas and in the pronouncements he or she hears from people, that is, statements indicating an analytic, questioning, examining manner.

Thus, the Involvement Inventory is based on a philosophy that there are three important phenomena in life with which a person must interact: (1) people, (2) objects, and (3) ideas. A person’s comfort and ability to cope with experiencing these phenomena determine whether he or she is able to reach out to them, grasp them, and use them; whether he or she is tentative in approaching them; or whether he or she avoids even encountering them. These may be thought of as phenomenological arenas in which a person may expend whatever amount of energy he or she chooses in meeting the challenges that present themselves within the arenas.

In summary, the Involvement Inventory measures three characteristics of people:

(A) Affective, or feeling, involvement with people,
(B) Behavioral involvement in accomplishing tasks, and
(C) Cognitive involvement with analyzing pronouncements encountered.

The ABC scales taken together represent a generally accurate involvement in and orientation toward life. A person who scores low on the A scale tends to be affectively passive, emotionally controlled, and interpersonally cautious. A low score on the B scale indicates a person who tends to be a follower, finds it difficult to plan ahead, and finds doing projects distasteful. A person who scores low on the C scale tends to be accepting
of information he or she receives, uninterested or unwilling to challenge information that
comes to him or her, and willing to believe pronouncements of others.

The Involvement Inventory has been subjected to extensive testing and refinement. The
present version of the instrument has been found to be reliable ($A = .76$, $B = .78$,
$C = .76$, total = .78) and valid (e.g., compared to people with low A, B, or C scale
scores, people with high A scores prefer spending their spare time with friends, people
with high B scores are involved in far more activities, and people with high C scores are
more likely to reject parental religious and political views). The correlation among the
scales is $AB = .37$, $AC = .18$, $BC = .49$, or an average of .34. These correlations indicate
moderate overlap in content.

**SCORING**

The response categories are weighted as follows: Disagree = 1; Unsure, Probably
Disagree = 2; Unsure, Probably Agree = 3; and Agree = 4. For statements that are
reversed items, agreement indicates low involvement; the weighting is: Disagree = 4;
Unsure, Probably Disagree = 3; Unsure, Probably Agree = 2; and Agree = 1. Statements
that are reverse weighted appear in the latter portion of each scale. ($A$ scale = statements
139, $B$ scale = statements 4074, $C$ scale = 75102). The totals of the three scales can be
added together for the overall involvement score.

**Uses of the Instrument**

The Involvement Inventory can be used to explore issues of life style. A person can gain
some insight into (1) how much energy he or she is expending beyond meeting the
maintenance needs of life and job, (2) whether that energy is focused in one of the three
phenomenological arenas of life, and (3) which one or two arenas are the focus of his or
her energy and involvement.

The Involvement Inventory can be used to help people generate personal agendas
for workshops when they conclude that they are using their time and energy in a way
that is not fruitful or when they feel that how they cope with the three arenas gets in the
way at work or home. Participants in a workshop can be given this inventory on the first
day. Scoring of their responses can be done by them or by clerical assistants. It is
important that the participants receive their scores relatively early so that they can use
the information in the workshop. The facilitator may have the participants post their
scores on the A, B, and C scales and on the total instrument using newsprint and felt-
tipped markers. Take a group frequency distribution for each of the four scores using a
chalkboard or newsprint. Have the members form into small groups (two to six people)
to interpret one another’s score patterns and to observe how the respondents see their
own scores. The instrument is also a useful device to teach the concepts of high and low
involvement in each of the three arenas and in combinations of the three.

For the facilitator who wishes to compare the group’s scores with those of another
group, the following norms are included as an example. The group illustrated was
composed of twenty individuals functioning on some level as small-group facilitators who were involved in a workshop in Montreal. Their backgrounds were fairly diverse and included industrial management, education, the clergy, and clinical psychology. Ages ranged from twenty-five to fifty-five years. The medians for this group were: A scale = 116, B scale = 100, and C scale = 86. The median for the total equaled 300. For purposes of identifying significantly high or low scores, the middle 50 percent ranged from 107 to 122 for the A scale, 88 to 109 for the B scale, and 78 to 92 for the C scale. The total ranged between 289 and 320.
IN VolvEMENt INVENTORY

Richard Heslin and Brian Blake

Instructions: Indicate your level of agreement with each statement by placing a check mark in the appropriate space on the accompanying answer sheet. Do not spend a lot of time on any one item. Respond with your initial reaction.

1. I like to get close to people.
2. I find it easy to express affection.
3. When I become angry, people know it.
4. When I am happy, I like to shout and celebrate.
5. I am the kind of person who would shout a friend’s name across a crowded room if I saw him or her come in the door.
6. I know I would stand up in a group and call a liar a liar.
7. I enjoy the shoulder-to-shoulder contact with other people in a crowded elevator.
8. The wise thing for a person to do is argue his or her case with a police officer when stopped for speeding.
9. I like to flirt with someone I find attractive even if I’m not serious.
10. I am an expressive person.
11. I prefer dogs to cats.
12. I have initiated a conversation with another person while waiting for an elevator.
13. The thought of participating in a “sensitivity training” group in which people tell one another exactly how they feel really appeals to me.
14. If someone is driving down the street and sees a friend walking in the opposite direction, he or she should honk the horn and wave.
15. It is a thrill to walk into a party alone when a large group already is there.
16. I like to dance the latest dances at a party.
17. If I am required to have continual, close contact with someone who has irritating habits, I would bring those habits to the person’s attention.
18. After I have been reading for some time, I have to spend some time talking with someone or else I feel lonely.
19. If I were emotionally attached to someone, I could sing a song or say a poem to him or her.
20. I become nervous when people get personal with me.
21. I am able to hide my feelings when I feel sad or angry.
22. People consider me a serious person.
23. When I am angry, I become quiet.
24. I never am wholly relaxed with other people.
25. I wish I were more relaxed and spontaneous in my dealing with my friends.
26. I have never spoken harshly to anyone.
27. If a friend of mine were concerned about something but embarrassed to speak about it, I would probably let my friend work it out himself or herself.
28. I become embarrassed when the topic of conversation touches on something the other person wants to avoid.
29. If someone challenged something I said in a decidedly hostile manner, I would probably try to break off the conversation at the first convenient opportunity.
30. It is best to forget an unpleasant person.
31. I get as much fun out of watching an exciting game of football or basketball as I do playing a game.
32. Even though I may want to, I feel nervous about putting my arm around the shoulder of a friend.
33. There are many times when I have held back from saying what I knew I should say because I didn’t want to hurt someone’s feelings.
34. If a person does something to hurt a friend, he or she should do something to make up for it rather than mentioning or apologizing for the hurt.
35. If I were riding on a train and the car I was in didn’t have an empty pair of seats, I would go on to another car to look for a double seat that was empty so that I wouldn’t have to sit with someone.
36. I am never quite sure how to handle it when someone flirts with me.
37. If a good-looking married man puts his arm around a woman in a friendly manner while talking to her, she should disengage herself at the first appropriate chance.
38. When people tease me in a group, I often do not know what to say in response.
39. I prefer watching television to sitting around and talking.
40. I always have at least four projects going at once.
41. I am the one who gets others going and in action.
42. I tend to take charge in my groups and direct the others.
43. I like to take risks.
44. I would rather build something than read a novel.
45. I have a very strong need to run things and organize things, even though doing so cuts into time I might devote to other activities.
46. I love to repair things.
47. I love to work with my hands, building things.
48. I have strong “arts and crafts” interests.
49. I do good work with my hands.
50. Nothing is quite so enjoyable as winning in competition.
51. I enjoy persuading people.
52. I enjoy playing competitive athletics.
53. It would be fun to try to make a radio using only a very basic blueprint.
54. As an accomplishment, I admire the Panama Canal more than the Theory of Evolution.
55. Even though I may delegate tasks to people who are helping me, it makes me nervous to do so because I know that if I want it done right, I should do it myself.
56. I find that I work faster than most people I know.
57. I have always enjoyed constructing model airplanes, ships, cars, and things like that.
58. I prefer to follow and let someone else take the lead.
59. I like to keep my risk low.
60. I prefer to be involved in an activity that someone else has organized.
61. I doubt that I could produce and market a product successfully.
62. I would rather read a play than make something.
63. I wouldn’t know where to begin if I had to build something like a fireplace.
64. I avoid taking chances.
65. I would rather play solitaire than build a birdhouse.
66. I prefer to join a group that is already well established, rather than join a new one.
67. For me the greatest joy is in finding out about things, rather than in doing things.
68. Life is so short that we should spend more time enjoying it and less time rushing around doing various projects.
69. I average more than seven hours of sleep per night.
70. I prefer to stick with one task until it is done before taking on another task.
71. I find it more gratifying to work out a successful compromise with the opposition than to compete with and defeat them.
72. When I am bored, I like to take a nap.
73. True contentment lies in coming to a harmonious adjustment with life rather than continually trying to “improve” it.
74. I envy the people in some religious orders who have time for peaceful contemplation and well-organized daily routine.
75. I love to try to uncover the logical flaws in television commercials.
76. You take a big chance if you don’t listen to more than one version of something.
77. I would not hesitate to write to any source or official to get the information I need on some problem.
78. I try to read two or three versions of a problem I am trying to understand.
79. I enjoy debating issues.
80. I enjoy analyzing two opposing views to find where they differ and where they agree.
81. When someone tells me something that does not sound quite right, I often check his or her source.
82. My acquaintances turn to me for new perspectives on the issues of the day.
83. I have more information about what is going on than my associates do.
84. It is almost always worth the effort to uncover the facts yourself by reading a number of viewpoints on an issue.
85. I don’t believe that any religion is the one true religion.
86. I don’t believe in life after death.
87. It is a good idea to read one or two foreign newspapers as a check on national newspapers.
88. The government’s response to such things as air pollution, water pollution, pesticide poisoning, and population explosion leads one to believe that it does not have the public welfare as its main interest.
89. It is fun to search far and wide to gather all of the appropriate information about a topic to be evaluated.
90. I like a friendly argument about issues of the day.
91. If people were forced to describe me as either short-tempered or over-critical, they would probably say that I am over-critical.
92. I have trouble finding things to criticize in something I read.
93. Most of what I read seems reasonable to me.
94. I wish someone would put out a book of known facts so that people would know what is right these days.
95. I don’t like to argue about ideas.
96. You should take the expert’s word on things unless you know for sure that the person is wrong.
97. I would rather read a summary of the facts than try to wade through the details myself.
98. I get almost all of my news information from television.
99. As with most people, 95 percent of my opinions come from personal acquaintances.
100. Once I have made up my mind on an issue, I stick to it.
101. If people were forced to describe me as either selfish or narrow-minded, they would probably say that I am narrow-minded.
102. Most of my acquaintances would describe me as productive rather than as individualistic.
## INVolvement Inventory

**Answer Sheet**

<table>
<thead>
<tr>
<th></th>
<th>Disagree</th>
<th>Unsure, Probably Disagree</th>
<th>Unsure, Probably Agree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>34</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
THE INVOLVEMENT INVENTORY

Scoring

1. The A scale (affective or feeling involvement with people) includes items 1 through 39. Items 1 through 19 are weighted differently than items 20 through 39. Draw a line under item 19 on the scoring sheet. Add the checks in each column for items 1 through 19 and place the sum in the spaces below. Multiply each column total by the multiplier beneath it. Add the four products across and put the total in the blank designated (A).

\[
\begin{array}{cccc}
\text{___} & \text{___} & \text{___} & \text{___} \\
\times 1 & \times 2 & \times 3 & \times 4 \\
\text{___} + \text{___} + \text{___} + \text{___} &= \text{____ (A)}
\end{array}
\]

Draw a line under item 39. Add the checks in each column for items 20 through 39 and proceed as you did with items 1 through 19 (notice that the multipliers are reversed from those for items 1 through 19).

\[
\begin{array}{cccc}
\text{___} & \text{___} & \text{___} & \text{___} \\
\times 1 & \times 2 & \times 3 & \times 4 \\
\text{___} + \text{___} + \text{___} + \text{___} &= \text{____ (a)}
\end{array}
\]

2. The B scale (behavioral involvement in accomplishing tasks) includes items 40 through 74. Draw a line under item 57. Proceed with the scoring as above.

\[
\begin{array}{cccc}
\text{___} & \text{___} & \text{___} & \text{___} \\
\times 1 & \times 2 & \times 3 & \times 4 \\
\text{___} + \text{___} + \text{___} + \text{___} &= \text{____ (B)}
\end{array}
\]

Draw a line under item 74 and proceed as above.

\[
\begin{array}{cccc}
\text{___} & \text{___} & \text{___} & \text{___} \\
\times 1 & \times 2 & \times 3 & \times 4 \\
\text{___} + \text{___} + \text{___} + \text{___} &= \text{____ (b)}
\end{array}
\]

3. The C scale (cognitive involvement with analyzing pronouncements encountered) includes items 75 through 102. Draw a line under item 91 and proceed with the scoring as above.

\[
\begin{array}{cccc}
\text{___} & \text{___} & \text{___} & \text{___} \\
\times 1 & \times 2 & \times 3 & \times 4 \\
\text{___} + \text{___} + \text{___} + \text{___} &= \text{____ (C)}
\end{array}
\]

Total the remaining columns and proceed as above.

\[
\begin{array}{cccc}
\text{___} & \text{___} & \text{___} & \text{___} \\
\times 1 & \times 2 & \times 3 & \times 4 \\
\text{___} + \text{___} + \text{___} + \text{___} &= \text{____ (c)}
\end{array}
\]
4. Obtain scale scores by adding the totals for each two-part scale. Then obtain the total involvement score by adding the three scale scores.

\[ A + a = \underline{\ \ \ \ \ } \]
\[ B + b = \underline{\ \ \ \ \ } \]
\[ C + c = \underline{\ \ \ \ \ } \]
Total involvement score = \underline{\ \ \ \ \ }
LIFE-STYLE QUESTIONNAIRE

Robert Driscoll and Daniel G. Eckstein

Adler (1930) believed that our characteristic reactions to life (“life styles”) are formulated before the age of five. Once a framework has been selected, all new experiences tend to be interpreted subjectively within that framework (Shulman, 1973), although our varied and unique perspectives of self and others during the early years create a multiplicity of individual traits. Human creativity also plays a part in that we actively decide what will best fit our purposes; for example, behaviors that lead to a feeling of belonging are repeated. The patterns set early tend to continue and to influence later preferences, values, and beliefs; for example, those who subconsciously decide that it is best to be “good” will evaluate events in terms of “right” and “wrong” and will adhere to this mode.

PURPOSE OF THE INSTRUMENT

The Life-Style Questionnaire was developed as an objective means to measure into which of five trait-descriptive lifestyle categories (aggressive, conforming, defensive, individualistic, or resistive) participants belong. None of the types is inherently “good” or “bad.” How an individual with the specific traits of each type reacts to his or her environment is unique, and each style of life includes facets of the others, resulting in an infinite variety of personality traits. To avoid possible negative stereotyping, the five lifestyle categories were given animal labels: tiger, chameleon, turtle, eagle, and salmon.

IMPLICATIONS

The Life-Style Questionnaire provides insight into the individual’s outlook. Results can be used to help the participant identify personal strengths and weaknesses and make choices among alternative behaviors. The results should be used not to label past behavior but to encourage client responsibility for future behavior. Clients must be encouraged to act on what is personally important and meaningful.

RELIABILITY

Twenty-five items were generated for each of the five life styles, and the resulting 125-item questionnaire was administered to two hundred subjects. Discrimination indices were computed, and the ten highest discriminators for each style were retained for use in the Life-Style Questionnaire. The range for each style of living was as follows: tiger
(+.37 to +.51), chameleon (+.25 to +.44), turtle (+.23 to +.41), eagle (+.41 to +.55), and salmon (+.22 to +.37).

Coefficients of determination were computed on the scales, resulting in the relationships shown here:

<table>
<thead>
<tr>
<th></th>
<th>Chameleon</th>
<th>Turtle</th>
<th>Eagle</th>
<th>Salmon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tiger</td>
<td>4.7%</td>
<td>1.0%</td>
<td>26.0%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Chameleon</td>
<td>32.0%</td>
<td>2.6%</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td>Turtle</td>
<td></td>
<td>0.1%</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td>Eagle</td>
<td></td>
<td></td>
<td>8.8%</td>
<td></td>
</tr>
</tbody>
</table>

The means and standard deviations for the styles were computed as follows:

<table>
<thead>
<tr>
<th>Style</th>
<th>( \bar{x} )</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tiger</td>
<td>30.62</td>
<td>4.70</td>
</tr>
<tr>
<td>Chameleon</td>
<td>23.91</td>
<td>4.64</td>
</tr>
<tr>
<td>Turtle</td>
<td>24.23</td>
<td>5.05</td>
</tr>
<tr>
<td>Eagle</td>
<td>31.79</td>
<td>4.97</td>
</tr>
<tr>
<td>Salmon</td>
<td>22.36</td>
<td>3.99</td>
</tr>
</tbody>
</table>

**REFERENCES**


LIFE-STYLE QUESTIONNAIRE

Robert Driscoll and Daniel G. Eckstein

Name _________________________________________________

Date ___________________________

Instructions: Read each of the following statements and assign points according to the following guidelines:

4 points = True for you always or almost always;
3 points = True for you more than half the time;
2 points = True for you less than half the time;
1 point = Never or almost never true for you.

_____ 1. I was a childhood leader.
_____ 2. I believe that my life will be most satisfying if there are some clear pathways for advancing and being rewarded.
_____ 3. I hate to admit defeat to others.
_____ 4. I find myself striving for greater freedom and independence.
_____ 5. I take part in social movements.
_____ 6. I am a “take charge” person.
_____ 7. I try to blend in.
_____ 8. I do not seem to have as much fun as other people have.
_____ 9. As a child I constantly told myself I was special, even though no one else thought so.
_____ 10. I have a great investment in my image.
_____ 11. I use my wits to move ahead of other people.
_____ 12. I resent feeling the need for other people’s approval.
_____ 13. I give up too easily after failure.
_____ 15. People have called me a “con artist.”
_____ 16. I like to have power and control.
_____ 17. I struggle hard to overcome my faults.
_____ 18. I very much want people to like me.
_____ 19. I take care of myself, and others should take care of themselves.
_____ 20. I enjoy “beating the system.”
_____ 21. I tackle projects with zest.
22. I sometimes feel depressed and I do not know why.
23. I brood too much.
24. I am my own person.
25. I could join the underground resistance movement.
26. I am smarter than most people.
27. I am unobtrusive.
28. I am afraid to express my anger.
29. I am a powerful individual.
30. I got away with a lot as a child.
31. I go after what I want in life.
32. When I was growing up, I felt that my presence was often ignored by one or both of my parents.
33. I try to hide my weaknesses.
34. I will be most satisfied if I am completely free to choose how I want to live.
35. I like to be “one up” on others.
36. I enjoy being ahead of other people.
37. I have survived by constantly being aware of other people’s opinions and what they want from me.
38. I believe that my feelings are nobody’s business but my own.
39. I make things happen.
40. I like to do things my way.
41. I like to be in positions of authority.
42. I do things right by following the rules.
43. I feel that I’m a nice person and submissive on the outside.
44. I like to “do my own thing.”
45. Growing up, I began to cut off my compassion for others because I had to win.
46. I have a strong need to be in charge of myself.
47. I can only have the really important things in life by blending in.
48. I try to appear “together.”
49. In deciding how I want to live and act, I am most satisfied if I am completely free to make this decision myself.
50. I like to be charming just to have my way.
LIFE-STYLE QUESTIONNAIRE SCORING SHEET

Instructions: Total the columns and then chart your total scores on the graph below. The graph provides a convenient transformation of each of your total scores into a standard score. (Standard scores are transformed scores with a mean of 50 and a standard deviation of 10.) Connect each of your standard scores to provide a profile and then go on to the interpretation sheet.

<table>
<thead>
<tr>
<th></th>
<th>I</th>
<th>II</th>
<th>III</th>
<th>IV</th>
<th>V</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>2</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>3</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>4</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>5</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>6</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>7</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>8</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>9</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>10</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>11</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>12</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>13</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>14</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>15</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>16</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>17</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>18</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>19</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>20</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>21</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>22</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>23</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>24</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>25</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>26</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>27</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>28</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>29</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>30</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>31</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>32</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>33</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>34</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>35</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>36</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>37</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>38</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>39</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>40</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>41</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>42</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>43</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>44</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>45</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>46</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>47</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>48</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>49</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>50</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
</tbody>
</table>

TOTALS: ____________  ____________  ____________  ____________  ____________

<table>
<thead>
<tr>
<th>20</th>
<th>30</th>
<th>40</th>
<th>50</th>
<th>60</th>
<th>70</th>
<th>80</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>19</td>
<td>22</td>
<td>24</td>
<td>26</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>14</td>
<td>17</td>
<td>22</td>
<td>24</td>
<td>26</td>
<td>29</td>
<td>30</td>
</tr>
<tr>
<td>13</td>
<td>16</td>
<td>21</td>
<td>24</td>
<td>26</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>12</td>
<td>15</td>
<td>20</td>
<td>22</td>
<td>24</td>
<td>26</td>
<td>28</td>
</tr>
<tr>
<td>11</td>
<td>14</td>
<td>18</td>
<td>20</td>
<td>22</td>
<td>24</td>
<td>26</td>
</tr>
<tr>
<td>10</td>
<td>13</td>
<td>17</td>
<td>19</td>
<td>21</td>
<td>23</td>
<td>25</td>
</tr>
<tr>
<td>9</td>
<td>12</td>
<td>16</td>
<td>18</td>
<td>20</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>8</td>
<td>11</td>
<td>15</td>
<td>17</td>
<td>19</td>
<td>21</td>
<td>23</td>
</tr>
<tr>
<td>7</td>
<td>10</td>
<td>14</td>
<td>16</td>
<td>18</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>6</td>
<td>9</td>
<td>13</td>
<td>15</td>
<td>17</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>5</td>
<td>8</td>
<td>12</td>
<td>14</td>
<td>16</td>
<td>18</td>
<td>20</td>
</tr>
<tr>
<td>4</td>
<td>7</td>
<td>11</td>
<td>13</td>
<td>15</td>
<td>17</td>
<td>19</td>
</tr>
<tr>
<td>3</td>
<td>6</td>
<td>10</td>
<td>12</td>
<td>14</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>2</td>
<td>5</td>
<td>9</td>
<td>11</td>
<td>13</td>
<td>15</td>
<td>17</td>
</tr>
<tr>
<td>1</td>
<td>4</td>
<td>8</td>
<td>10</td>
<td>12</td>
<td>14</td>
<td>16</td>
</tr>
</tbody>
</table>

TIGER  |  CHAMELEON  |  TURTLE  |  EAGLE  |  SALMON
LIFESTYLE QUESTIONNAIRE INTERPRETATION SHEET

Columns I through V correspond to lifestyle characteristics of tigers, chameleons, turtles, eagles, and salmon, as defined below.

TIGERS

_Tigers_ are generally considered to be _aggressive_. They enjoy exercising authority, like to be the center of attention, and may insist on having their own way. Tigers usually were childhood leaders and continue in this role as adults. They are also enterprising, vigorous, and ambitious.

*Those with low tiger scores* (Column I) tend to be seen as:
- Retiring, Inhibited, Indifferent, Unassuming, Easily Influenced,
- Dependent, Apathetic, Submissive,
- Conventional, Cautious, Conservative,
- Leisurly, Self-Restrained, passive,
- Unambitious, Quiet, and Easygoing

*Those with high tiger scores* (Column I) tend to be seen as:
- Aggressive, Confident, Persistent,
- Persuasive, Self-Reliant, Independent,
- Initiators, Potential Leaders,
- Ambitious, Clever, Enterprising,
- Vigorous, Demanding, Active,
- Planners, Domineering, and Competitive

CHAMELEONS

_Chameleons_ are generally seen as _conforming_. They are flexible and more likely to face problems directly. Chameleons frequently move up rapidly in business, as they are dependable, hard working, and honest. They are cooperative, sociable, warm, helpful, and practical and may be aesthetic.

*Those with low chameleon scores* (Column II) tend to be seen as:
- Inhibited, Wary, Demanding, Lazy,
- Moody, Changeable, Aggressive,
- Deceitful, Stubborn, Rebellious,
- Impatient, Shrewd, Headstrong,
- Inattentive, Self-Centered,
- Opportunistic, Guileful, and Impulsive

*Those with high chameleon scores* (Column II) tend to be seen as:
- Cooperative, Sociable, Warm, Helpful,
- Diligent, Persistent, Gentle, Sincere,
- Honest, Conscientious, Tolerant,
- Practical, Deliberate, Serious,
- Obliing, Self-Denying, Dependable,
- Conforming, Socially Ascendant, and Peaceable
TURTLES

*Turtles* are generally thought to be defensive. They are earnest and resourceful and lead self-controlled, stable lives. Turtles are frequently “loners” with one or two close relationships. They are intuitive and sensitive, with some trouble admitting fallibility. Others may consider turtles to be stubborn because they have no interest in changing the status quo.

Those with low turtle scores (Column III) tend to be seen as:
- Counteractive, Critical, Dominant,
- Persistent, Demanding, Aggressive,
- Ambitious, Assertive, Conforming,
- Strong, Unhappy, Misunderstood, and Discouraged

Those with high turtle scores (Column III) tend to be seen as:
- Stable, Self-Controlled, Placid,
- Earnest, Defensive, Stubborn,
- Apologetic, Resourceful, Insecure,
- Vulnerable, Rationalistic, Intuitive,
- Guarded, and Persistent

EAGLES

*Eagles* tend to be seen as individualistic. They are not concerned with public opinion and may be egoistic and infringe on the rights of others to get their own way. Eagles are capable, industrious, assertive, and adventurous—idealizing “progress.” They are found in any field that esteems independence and are frequently entrepreneurial.

Those with low eagle scores (Column IV) tend to be seen as:
- Awkward, Disorganized, Aloof,
- Lacking in Self-Direction, Shallow,
- Insecure, Compliant, Submissive,
- Inhibited, Cautious, Dull,
- Conventional, Conforming, Guarded,
- Worrying, Anxious, Delicate, and Pedantic

Those with high eagle scores (Column IV) tend to be seen as:
- Capable, Industrious, Strong, Forceful,
- Foresighted, Clear Thinking,
- Independent, Spontaneous, Intelligent,
- Progressive, Ostentatious, Well Informed,
- Rebellious, Confident,
- Idealistic, Egoistic, Assertive, and Adventurous
**SALMON**

*Salmon* usually are considered *resistive*. They prefer to “swim against the current” rather than support “establishment” values. Salmon may take up causes against oppression and demand that they be heard. They are vigorous, progressive, and rebellious and they dislike what they consider to be false social niceties.

*Those with low salmon scores (Column V) tend to be seen as:*
- Indifferent, Apathetic, Passive,
- Compliant, Conventional, Easygoing,
- Conservative, Dependent, and Cautious

*Those with high salmon scores (Column V) tend to be seen as:*
- Persuasive, Independent, Vigorous,
- Demanding, Rebellious, Protecting,
- Forceful, Progressive, and Competitive
MACH V ATTITUDE INVENTORY

Richard Christie

Since the publication of Machiavelli’s *The Prince* in 1532, the name of its author has become associated with the use of guile, deceit, and opportunism in interpersonal relations. A “Machiavellian” is traditionally thought to be someone who manipulates others for his or her own purposes. This inventory attempts to distinguish between the behavior of a person who emulates Machiavelli’s prince (a “high Mach”) and that of a person who avoids such behavior (a “low Mach”). It is an effort to measure a person’s general strategy for dealing with people, especially the degree to which he or she believes that other people can be manipulated in interpersonal situations.

It is important to guard against the conventional pejorative implications surrounding the term “Machiavellianism.” None of the research evidence indicates that high Machs are more hostile, vicious, or vindictive than low Machs. It shows only that they have a cool detachment (the “cool syndrome”), making them less emotionally involved with other people and even with their own beliefs or behavior. In addition, no differences have been found between high Machs and low Machs on the basis of intelligence, social status, or social mobility. The facilitator should stress this interpretive caution clearly to the participants.

DEVELOPMENT OF THE INVENTORY

Machiavelli’s *The Prince* and *The Discourses*, which present series of short essays, each augmenting a particular point the author wished to make, were reviewed for statements that could be used as scale items. Some editing was necessary; some of Machiavelli’s reflections were condensed and some were reversed, in order to counteract the tendency of some respondents to agree with almost any statement presented on a questionnaire. In addition to statements gathered from Machiavelli, others that were believed to tap the same syndrome were included. Mach V is the fifth version of the scale that evolved from the original items.

DESCRIPTION OF THE INVENTORY

Mach V consists of twenty groups of three statements, which fall into three areas: (1) the nature of interpersonal tactics, (2) views of human nature, and (3) abstract or generalized.
morality. The inventory is presented in a forced-choice format in order to offset the tendency of many respondents to distort their responses on a questionnaire to reflect socially desirable traits.

In each group of statements, one statement is keyed to the variable the scale is supposed to measure; another statement refers to a different variable that has been judged to be equal to the first in social desirability; a third statement is a “buffer” statement that is either much lower or much higher in social desirability than the other two (i.e., high if the two matched items are low in social desirability, low if they are high). The main function of this statement is to disguise the nature of the scale.

The respondent first chooses the statement that is most true; then he or she must decide which of the remaining two statements is most false. The third statement is left unmarked. The respondent’s total score is determined by the number of high-Mach responses and low-Mach responses. The range is from 40 to 160, with 100 being the theoretical neutral point. Therefore, a score of 160 on Mach V means that every item keyed for Mach is most (or least) like the subject, and the item matched for social desirability is at the opposite extreme. A score key is included, with instructions for scoring the inventory.

PERSONAL CHARACTERISTICS OF HIGH AND LOW MACHS

Using the behavior of high- and low-Mach experimental subjects, it is possible to delineate their characteristics as persons. A handout sheet that summarizes these differing personal characteristics is provided at the end of the inventory.

Emotional Involvement with Others

The essential distinction between the high-Mach personality and the low-Mach individual can be identified as the difference between the “cool syndrome” and the “soft touch.” High Machs are relatively unmoved by emotional involvement with others, while low Machs are more likely to do or accept what another wants simply because that person wants it.

Social Influenceability

High Machs are less susceptible to social pressure or influence than are low Machs. This finding suggests that high Machs might be more successful in bargaining, because their detachment enables them to resist social demands.

Conventional Morality

One of the characteristics of high Machs, their slight concern for conventional morality, can be seen as a consequence of their affective detachment. High Machs are less likely than low Machs to accept the wishes or beliefs of others without justification.
High Machs will lie or cheat more when given “rational” justification, while low Machs will do so when personally persuaded. Although opposed to dishonesty in principle, low Machs can be persuaded to lie or cheat if they are presented with a strong, personal inducement, especially in a face-to-face situation. In contrast, high Machs, although not opposed to dishonesty in principle, are less likely to cheat if the rational incentives are low or the costs are high.

**Suspiciousness**

High Machs’ suspiciousness of other people can be seen as another example of their lack of susceptibility to social influence, as contrasted to low Machs’ tendency to accept others’ definitions of a situation. However, high Machs, although suspicious of people, are not suspicious of events, objects, or ideas.

**A Cognitive Versus a Personal Orientation**

Research concluded that high Machs tend to ignore the potential aspects of human relations, social values, or ethical considerations in a situation and concentrate instead on the explicit, cognitive aspects. However, high Machs do not appear unconcerned; they may express more concern than low Machs, but they are not personally involved in these concerns.

Low Machs, on the other hand, accept implicit “shoulds”: one ought to do what he or she believes in and believe in what he or she does. High Machs do not show evidence of such constraints.

High Machs concentrate on what is explicit and how to exploit it; they adapt their tactics to the specific conditions—a behavior called “opportunistic” by those who deplore it and “realistic” by those who admire it. They also adjust the amount of their manipulation and change their strategies more subtly than low Machs. High Machs are politic, not personal.

One consequence of their cool, cognitive, specific approach is that they never appear to be “obviously manipulating.” The high Mach is the one who gets others to help him or her in such a way that they are unaware of the techniques used on them.

Although both high and low Machs are sensitive to others, they are so in quite different ways. High Machs use information about the other person. Low Machs take others’ needs and concerns as their own, looking at the other person as a person, seeing a situation from his or her point of view, thinking in terms of his or her feelings and wishes. Low Machs attend more to the particular person who is confronting them. They become “carried away” in interactions with others, while high Machs maintain a perspective on the situation.

A “soft-touch” low Mach contacts others softly, does not violate the positions of other people, and moves toward others in contacting them. In contrast, a high Mach does not move himself or herself; instead, he or she attempts to move others to where he or she wants them to be.
Exploitation

It seems clear that, given the opportunity and incentive, high Machs will exploit whatever resources the situation provides in order to pursue their goals. However, in no instance during this study were high Machs more hostile, vicious, or punitive toward others than were low Machs.

High Machs attend to their own cognitive analysis of a situation and view themselves as a fixed reference point in relation to others. Low Machs are influenced by private, implicit assumptions but tend to follow others more easily and view them in a personal way.

Control of Group Structure

As would be expected, high Machs tend to take over leadership in face-to-face situations. They initiate and control the group structure and thereby control both the process and the outcome. They appear to have a greater ability to organize their own and others’ resources to achieve a task goal.

USES OF THE INVENTORY

Mach V can be used in several situations. In personal growth groups, the inventory can help to raise individuals’ awareness of their own and others’ interpersonal styles and beliefs. Leadership and management development courses and training programs would find the data from Mach V useful to the understanding of the characteristics and behavior of both supervisors and subordinates. Also an appropriate use for Mach V is team building within a group or an organization.

REFERENCES AND READING


MACH V ATTITUDE INVENTORY

Richard Christie

Instructions: You will find twenty groups of statements listed below. Each group is composed of three statements. Each statement refers to a way of thinking about people or things in general. The statements reflect opinions and not matters of fact—there are no “right” or “wrong” answers.

Read each of the three statements in each group. First decide which of the statements is most true or the closest to your own beliefs. Put a plus sign (+) in the space provided before that statement. Then decide which of the remaining two statements is most false or the farthest from your own beliefs. Put a minus sign (–) in the space provided before that statement. Leave the last of the three statements unmarked.

Most True = +
Most False = –

Here is an example:

_____ A. It is easy to persuade people but hard to keep them persuaded.
___+ B. Theories that run counter to common sense are a waste of time.
___– C. It is only common sense to go along with what other people are doing and not be too different.

In this example, statement B would be the one you believe in most strongly, and statements A and C would be ones that are not as characteristic of your opinions. Of these two, statement C would be the one you believe in least strongly and the one that is least characteristic of your beliefs.

You will find some of the choices easy to make; others will be quite difficult. Do not fail to make a choice no matter how hard it may be. Remember: mark two statements in each group of three—the one that is the closest to your own beliefs with a + and the one that is the furthest from your beliefs with a –. Do not mark the remaining statement. Do not omit any group of statements.

1. ___ A. It takes more imagination to be a successful criminal than to be a successful business person.
___ B. The phrase “the road to hell is paved with good intentions” contains a lot of truth.
___ C. Most people forget the death of their parents more easily than the loss of their property.
2. ____ A. People are more concerned with the cars they drive than with the clothes their spouses wear.  
   ____ B. It is very important that imagination and creativity in children be cultivated.  
   ____ C. People who are suffering from incurable diseases should have the choice of being put painlessly to death.
3. ____ A. Never tell anyone the real reason you did something unless it is useful to do so.  
   ____ B. The well-being of the individual is the goal that should be worked for before anything else.  
   ____ C. Once a truly intelligent person makes up his or her mind about the answer to a problem, he or she rarely continues to think about it.
4. ____ A. People are getting so lazy and self-indulgent that it is bad for our country.  
   ____ B. The best way to handle people is to tell them what they want to hear.  
   ____ C. It would be a good thing if people were kinder to others who are less fortunate than themselves.
5. ____ A. Most people are basically good and kind.  
   ____ B. The best criterion for a wife or husband is compatibility—other characteristics are nice but not essential.  
   ____ C. Only after you have gotten what you want from life should you concern yourself with the injustices in the world.
6. ____ A. Most people who get ahead in the world lead clean, moral lives.  
   ____ B. Any hardworking person should not be blamed for putting his or her career before his or her family.  
   ____ C. People would be better off if they were concerned less with how to do things and more with what to do.
7. ____ A. A good teacher is one who points out unanswered questions rather than gives explicit answers.  
   ____ B. When you ask someone to do something for you, it is best to give the real reasons for wanting it rather than giving reasons that might carry more weight.  
   ____ C. A person’s job is the best single indicator of the sort of person he or she is.
8. ___ A. The construction of such monumental works as the Egyptian pyramids was worth the enslavement of the workers who built them.
___ B. Once a way of handling problems has been worked out, it is best to stick to it.
___ C. You should take action only when you are sure that it is morally right.

9. ___ A. The world would be a much better place to live in if people would let the future take care of itself and concern themselves only with enjoying the present.
___ B. It is wise to flatter important people.
___ C. Once a decision has been made, it is best to keep changing it as new circumstances arise.

10. ___ A. It is a good policy to act as if you are doing the things you do because you have no other choice.
___ B. The biggest difference between most criminals and other people is that criminals are stupid enough to get caught.
___ C. Even the most hardened and vicious criminal has a spark of decency somewhere inside.

11. ___ A. All in all, it is better to be humble and honest than to be important and dishonest.
___ B. People who are able and willing to work hard have a good chance of succeeding in whatever they want to do.
___ C. If a thing does not help us in our daily lives, it is not very important.

12. ___ A. People should not be punished for breaking a law that they think is unreasonable.
___ B. Too many criminals are not punished for their crimes.
___ C. There is no excuse for lying to someone else.

13. ___ A. Generally speaking, people will not work hard unless they are forced to do so.
___ B. Every person is entitled to a second chance, even after committing a serious mistake.
___ C. People who cannot make up their minds are not worth bothering about.
14. ____ A. A person’s first responsibility is to his or her spouse, not to parents.
   ____ B. Most people are brave.
   ____ C. It is best to pick friends who are intellectually stimulating rather than ones who are comfortable to be around.

15. ____ A. There are very few people in the world who are worth concerning oneself about.
   ____ B. It is hard to get ahead without cutting corners here and there.
   ____ C. A capable person who is motivated for his or her own gain is more useful to society than a well-meaning but ineffective person.

16. ____ A. It is best to give others the impression that you can change your mind easily.
   ____ B. It is a good working policy to keep on good terms with everyone.
   ____ C. Honesty is the best policy in all cases.

17. ____ A. It is possible to be good in all respects.
   ____ B. To help oneself is good; to help others is even better.
   ____ C. War and threats of war are unchangeable facts of human life.

18. ____ A. Barnum was probably right when he said that there is at least one sucker born every minute.
   ____ B. Life is pretty dull unless one deliberately stirs up some excitement.
   ____ C. Most people would be better off if they controlled their emotions.

19. ____ A. Sensitivity to the feelings of others is worth more than poise in social situations.
   ____ B. The ideal society is one in which all people know their place and accept it.
   ____ C. It is safest to assume that all people have a vicious streak and that it will come out when the chance arises.

20. ____ A. People who talk about abstract problems usually do not know what they are talking about.
   ____ B. Anyone who completely trusts anyone else is asking for trouble.
   ____ C. It is essential for the functioning of a democracy that everyone vote.
MACH V ATTITUDE INVENTORY SCORE KEY

Instructions: To find your score on the Mach V Attitude Inventory, locate the combination of letters and plus or minus signs that you chose for each item (group of statements) in the inventory. For example, if for the first group of statements you marked statement B with a plus (+) and statement C with a minus (–), your score for that item would be 3.

<table>
<thead>
<tr>
<th>Item</th>
<th>1</th>
<th>3</th>
<th>3</th>
<th>5</th>
<th>5</th>
<th>7</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A+</td>
<td>B+</td>
<td>A+</td>
<td>B+</td>
<td>C+</td>
<td>C+</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>C–</td>
<td>C–</td>
<td>B–</td>
<td>A–</td>
<td>B–</td>
<td>A–</td>
<td></td>
</tr>
</tbody>
</table>

Mark your score for each item in the appropriate place in the score column. Do this for each of the twenty items. Then sum the scores and add 20. The range is from 40 to 160, with 100 the neutral point.

Points per Item by Response Patterns

<table>
<thead>
<tr>
<th>Item</th>
<th>1</th>
<th>3</th>
<th>3</th>
<th>5</th>
<th>5</th>
<th>7</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A+</td>
<td>B+</td>
<td>A+</td>
<td>B+</td>
<td>C+</td>
<td>C+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C–</td>
<td>C–</td>
<td>B–</td>
<td>A–</td>
<td>B–</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A+</td>
<td>C–</td>
<td>B+</td>
<td>C–</td>
<td>A+</td>
<td>B+</td>
<td>C+</td>
</tr>
<tr>
<td></td>
<td>C–</td>
<td>B+</td>
<td>A+</td>
<td>B–</td>
<td>C+</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>C+</td>
<td>A–</td>
<td>B+</td>
<td>C+</td>
<td>B+</td>
<td>A+</td>
<td>A+</td>
</tr>
<tr>
<td></td>
<td>C–</td>
<td>B–</td>
<td>A–</td>
<td>B–</td>
<td>C–</td>
<td>B–</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>A+</td>
<td>B–</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>B+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>C–</td>
<td>C–</td>
<td>A–</td>
<td>C–</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>B+</td>
<td>B+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>B–</td>
<td>C–</td>
<td>A–</td>
<td>C–</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A+</td>
<td>C–</td>
<td>B+</td>
<td>A+</td>
<td>B+</td>
<td>C+</td>
<td>C+</td>
</tr>
<tr>
<td></td>
<td>C–</td>
<td>B–</td>
<td>C–</td>
<td>A–</td>
<td>C–</td>
<td>B–</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>B+</td>
<td>A–</td>
<td>C+</td>
<td>B+</td>
<td>C+</td>
<td>A+</td>
<td>A+</td>
</tr>
<tr>
<td></td>
<td>C–</td>
<td>B–</td>
<td>C–</td>
<td>A–</td>
<td>C–</td>
<td>B–</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>C+</td>
<td>B–</td>
<td>A+</td>
<td>C+</td>
<td>B+</td>
<td>B+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>A–</td>
<td>C–</td>
<td>A–</td>
<td>B+</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>C+</td>
<td>B–</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>B+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>A–</td>
<td>C–</td>
<td>A–</td>
<td>C–</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>A+</td>
<td>B–</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>C–</td>
<td>C–</td>
<td>B–</td>
<td>A+</td>
<td>C–</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>A+</td>
<td>B–</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>B+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>C–</td>
<td>C–</td>
<td>A+</td>
<td>A+</td>
<td>B–</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>C+</td>
<td>B–</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>B+</td>
<td>B+</td>
</tr>
<tr>
<td></td>
<td>B–</td>
<td>C–</td>
<td>A–</td>
<td>A+</td>
<td>C–</td>
<td>C–</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>C+</td>
<td>B–</td>
<td>A+</td>
<td>C+</td>
<td>B+</td>
<td>A+</td>
<td>A+</td>
</tr>
<tr>
<td></td>
<td>A–</td>
<td>B–</td>
<td>A–</td>
<td>B–</td>
<td>C–</td>
<td>A–</td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>5</td>
<td>7</td>
<td>Score</td>
</tr>
<tr>
<td>------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td>-------</td>
</tr>
<tr>
<td>14</td>
<td>B+</td>
<td>A+</td>
<td>B+</td>
<td>A+</td>
<td>C+</td>
<td>C+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C−</td>
<td>C−</td>
<td>A−</td>
<td>B−</td>
<td>A−</td>
<td>B−</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>B+</td>
<td>B+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>B−</td>
<td>B−</td>
<td>A−</td>
<td>C−</td>
<td>A−</td>
<td>C−</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>B+</td>
<td>B+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>B−</td>
<td>B−</td>
<td>A−</td>
<td>C−</td>
<td>A−</td>
<td>C−</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>A+</td>
<td>B+</td>
<td>A+</td>
<td>B+</td>
<td>C+</td>
<td>C+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C−</td>
<td>C−</td>
<td>B−</td>
<td>A−</td>
<td>B−</td>
<td>A−</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>C+</td>
<td>A−</td>
<td>B+</td>
<td>C+</td>
<td>B+</td>
<td>A+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>A–</td>
<td>A−</td>
<td>B−</td>
<td>C−</td>
<td>B−</td>
<td>C−</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>B+</td>
<td>A+</td>
<td>B+</td>
<td>A+</td>
<td>C+</td>
<td>C+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>C−</td>
<td>C−</td>
<td>A−</td>
<td>B−</td>
<td>A−</td>
<td>B−</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>A+</td>
<td>C+</td>
<td>A+</td>
<td>C+</td>
<td>B+</td>
<td>B+</td>
<td></td>
</tr>
<tr>
<td></td>
<td>B−</td>
<td>B−</td>
<td>C−</td>
<td>A−</td>
<td>C−</td>
<td>A−</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Score</td>
</tr>
</tbody>
</table>
## HIGH MACHS VS. LOW MACHS

This list indicates for each characteristic in the left-hand column whether that characteristic is more typical of high Machs or low Machs.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>High Machs</th>
<th>Low Machs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emotional Detachment</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Susceptibility to Social Pressure</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Acceptance of Conventional Morality</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Manipulation/Exploitation</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Tendency To Be Persuaded</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Capability of Persuading Others</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Suspiciousness of Others</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Politic Attitude</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Personal Orientation</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Cognitive Orientation</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Control over Social Structures</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
NETWORKING SKILLS INVENTORY

Beverly Byrum-Robinson and J. David Womeldorff

INTRODUCTION

Networking is emerging as an important concept in the study of professional effectiveness and advancement, leadership, and organizations. It has been linked to studies of leadership power and influence skills, career-development and promotion tactics, organizational structure, and communication processes. Networking has become popularized and is often considered to be related to job seeking and personal advancement, with an emphasis on self-promotion and trying to use others for one’s own ends (Stark, 1985).

Only recently has networking been more broadly defined as a complex of knowledge, skills, and attitudes that lends itself to individual, group, and organizational effectiveness (McHale, 1987). For purposes of this instrument, networking is defined as “the ability to create and maintain an effective, widely based system of resources that works to the mutual benefit of oneself and others.”

With increasing decentralization in organizations and the flattening of organizational structures, more and more employees find themselves managing processes that involve people over whom they have no formal authority. For example, they may work in ad hoc groups such as task forces or participate in project teams in which leadership roles change as the focus shifts. As social complexity increases in organizations, employees in leadership and/or management roles must master and utilize a wide range of face-to-face, interpersonal methods and tactics to effectively fulfill individual and organizational objectives (Kotter, 1982, 1985). Therefore, networking is becoming an increasingly important component of the effective leader’s repertoire, regardless of his or her place in the organizational structure.

REVIEW OF RESEARCH

Networking and Networks

Precipitated largely by Granovetter’s (1974) landmark study, which traced network links of individuals who were looking for jobs, networking rose in popularity. The conclusion that most of those surveyed found their jobs as a result of networking outside their own personal support systems, coupled with the growing number of women and minorities in
the work force in the 1970s, led to the treatment of networking as a power tool for advancing up the career ladder (Helgensen, 1985; Smith, 1983; Stark, 1985).

However, even some of those who extolled the effectiveness of networking to further one’s own interests began to see the limited scope of such a self-serving framework. Writing in a popular women’s publication, Helgensen (1985) expanded her concept of networking by commenting:

Knowing how to network is really a matter of knowing how to be helpful to the people with whom we work and ask for help in return. . . . In reality interdependence, not independence, is the key to getting somewhere in the work world. . . . Such an attitude expresses what’s best about networking: the ability to create an effective support system for yourself that also works to the advantage of others. (p. 236)

Growing out of the limited job-seeking perspective, networking is becoming identified as an emerging style of management within the organization (Naisbitt & Aburdene, 1985). Increasingly, within organizations, people are learning from one another horizontally; everyone is becoming a resource for everyone else; and each person is receiving support and assistance from many different directions. McHale (1987) identifies a variety of management networking activities, such as the following:

1. Finding the right track to multiple sources of information related to a project;
2. Bridging the information flow between functions such as finance and marketing;
3. Communicating by both formal and informal means to accomplish projects;
4. Doing things and/or gathering information without overpowering others;
5. Managing the give and take of information flow within an organization or between organizations, often outside formal organizational lines; and
6. Facilitating the interchange among individuals who serve as resources to obtain a specific goal.

This list suggests that networking involves a set of skills and activities that rely heavily on effective interpersonal communication for gathering, processing, and moving information in organizations. Networking is a set of behaviors that take place within the context of organizations. Within organizations, networking is often studied within the framework of social networks (Lincoln & Miller, 1979; Rogers, 1981; Tichy, 1983; Tichy & Fombrun, 1979; Tichy, Tushman, & Fombrun, 1979).

Lincoln and Miller (1979) distinguish between relationships with “instrumental ties, those arising in the course of performing appointed work roles, and primary ties, those informal social relations that have been shown both to enhance and to impede the attainment of formal organizational goals.” By examining the characteristics of people in organizations that determine the sequence of direct and indirect ties between them, we arrive at insights into organizational communication processes.

As communication processes derive from structures, Tichy (1983) further points out that clusters of people are both formally structured (prescribed), such as departments or work groups, and informally structured (emergent), such as coalitions and cliques. Only
a portion of the organizational structure is prescribed. Thus, unplanned structures and
communication patterns generally emerge in all organizations. Individuals’ involvement
in emergent networks—for both instrumental and primary reasons—is especially
important, because networking is becoming more and more the way to accomplish
things in organizations. In fact, networking is recognized as a key leadership skill and as an
important tool for effective utilization of power and influence.

**Relationship to Leadership, Power, and Influence**

Networking is often the hidden side of organizational leadership (Barnes & Kriger,
1986). Traditionally, one thinks of organizational leadership as being tied to the
system’s hierarchical structure, with leadership at the top of the organizational chart.
According to Barnes and Kriger (1986), “Leadership goes beyond a person’s formal
position into realms of informal, hidden, or unauthorized influence.” Effective leaders
are relying less on the traditional chain of command to get things done and more on
working through informal or quasi-formal networks.

Hierarchies and networks are complementary aspects of leadership. In his landmark
study of general managers, Kotter (1982) observed that networking was a key skill and
practice of the most successful general managers and that they spent significant time in
building and maintaining an extensive network of support for carrying out their agendas.
This network was different from, but consistent with, the formal organizational structure
in which they operated.

Networking also relates to the leadership skills of representing one’s unit or
organization (Baliga & Hunt, 1988); anticipating future organizational trends and issues
(Byrd, 1987); and organizing, making decisions, and negotiating (Hosking, 1988;
Hosking & Morley, 1988). As a leadership skill, networking is an effective source of
power and influence (Kanter, 1979; Kotter, 1982; Kotter, 1985; PotterBrotman, 1988).
Kanter (1979) suggests that “power in organizations is the ability to mobilize resources
[human and material] to get things done...[which involves] first, access to resources,
information, and support necessary to carry out a task; and, second, ability to get
cooperation in doing what is necessary.” She also notes that productive power is related to
*connections* and that important sources of such power include close contact with
*sponsors, peer networks, and subordinates*.

Supporting the notion that vertical and horizontal contacts enhance organizational
influence, Brass (1985), in his study of men’s and women’s networks in a newspaper-
publishing company, found that individuals who were part of the informal interaction
networks of supervisors and top executives were more likely to have influence than
those who were part of nonsupervisory networks. Kotter (1985) also emphasizes the
importance of networking with one’s superiors, subordinates, and peers and adds a
critical component to this study by providing a framework of three bases on which
leaders build influence at all these levels:

1. Seeking relevant information;
2. Building and maintaining good working relations; and
3. Developing a good track record.

Kotter (1988) maintains that networking is needed at all levels of leadership and management and that it is often an overlooked activity. He continues with the notion that far too many people ignore this management activity:

They prefer, and have been taught, to focus on the technical aspects of their work. When others don’t automatically cooperate with them, they tend to see the problem as entirely the other party’s fault. When others ask them for help, they quickly resent not being left alone to do “their jobs.” And when their performances are rated lower than their own evaluations . . . they usually conclude that they are the victims of “politics.” (p. 37)

Building a base of influence—by using networking skills—should lead to individual and organizational effectiveness.

**Networking Effectiveness**

In different types of organizations, networking may impact different elements of organizational effectiveness. In their study of innovation in three different organizations, Albrecht and Topp (1984) found that workers were more likely to talk about new ideas with those colleagues with whom they also discussed work and personal matters than they were to follow prescribed channels based on hierarchical role relationships. In one study (Sherman et al., 1986) that looked at the impact of emergent network structure of organizational socialization in forty-two churches, socialization of members into churches appeared more effective in those congregations that displayed stronger information-flow networks.

Moch (1980), in a study of a manufacturing and packaging plant, found that social integration into work-relationship networks can lead to internal motivation. Furthermore, Moch (1980) stated that considerable research supports the contention that social (network) involvements produce organizational commitment. He credits Katz (1964) with first suggesting what his study verified, that “those who are well integrated into networks of social relationships at work will be more likely to participate in decision making, see clearly how they contribute to group performance, and share in the rewards of group accomplishment.”

In her study of innovation in five companies, Kanter (1982) showed that the highest rates of innovation were found in those organizational cultures that encouraged collaboration, allowed different kinds of information to flow freely, and featured coalitions built of supporters and collaborators who worked together on new ideas.

In another study of influence and power related to organizational culture, Fombrun (1983) studied the research and development department of a high-technology, medical-instrument corporation and found that power and influence are strongly affected by the culture in which the individual is working. Therefore, networking is only one source of influence, and the strength of its impact depends on the organizational culture. Individuals who choose to network are going to be challenged more by organizations
that place high value on the flow of power through formal chains of command than by a culture that values coalitions, collaboration, and informal boundaries.

In summary, the research suggests that networking is an important tool for advancement, leadership, power, and influence. It is also related to organizational variables such as socialization, motivation, commitment, and innovation—which are, themselves, modified by the existing culture.

DEVELOPING THE MODEL

Goals

The following goals were set in developing the networking model:

1. To create a simple, easily understood model;
2. To analyze the concept of networking and, from that analysis, to create a model with distinct dimensions;
3. To develop a model that would address the knowledge, attitude, and skill components of networking competency;
4. To create a model useful in identifying and improving networking skills;
5. To capture the seemingly elusive ability to network in a way that could be taught;
6. To base the model on already-validated research; and
7. To develop a model that would yield a valid and reliable instrument that could be completed in a training classroom and would provide immediate feedback to participants concerning their networking competence.

The Process

The instrument’s development involved conducting structured interviews with human resource development (HRD) professionals who were also seen as “expert networkers” and additional research with professionals in the field. The behavioral items in the survey were derived from those interviews, Kotter’s framework, and other research of relevant literature. A draft of the instrument was then given to approximately ten professionals for feedback on clarity, scoring, and item redundancy. The instrument and model were revised before introducing it at the Region III conference of the American Society for Training and Development on September 20, 1988, in Cincinnati, Ohio. At that session, general, nonscientific feedback indicated a consensus of face validity for the instrument, which then contained forty-five items.

The instrument’s validity and reliability then became the subject of a master’s thesis. To determine content and construct validity, a panel of seven experts in the field was given the definitions of networking and its categories and asked to determine the
importance of each of the forty-five items to networking by using a five-point importance scale, then to reread each item and to assign it to one of the following categories: relevant information, working relations, track record, or none. Secondly, 225 participants were asked to complete the inventory. The vast majority of the research population were men and women in staff and line management in human resources, sales, software development, and various financial-services positions. The data gathered from this population were then factor analyzed.

To determine reliability, the factor loadings were used to reduce the total number of items in the instrument and, in several cases, to reassign an item to a category other than the one to which it was originally placed when the instrument was designed. The revised Networking Skills Inventory was then subjected to a special reliability measure, “Cronbach’s Alpha.”

THE INSTRUMENT

The Networking Skills Inventory, which is based on the work of John Kotter (1982, 1985), was created and field tested by the authors. It is constructed of twenty-four items that ask participants to respond to a statement in terms of how often they engage in the behavior described. The five-point scale ranges from “almost always” (5) to “almost never” (1). Scores are translated into three dimensions, corresponding to Kotter’s three bases for building influence:

1. Attaining relevant information;
2. Creating and maintaining good working relations; and
3. Establishing a good track record.

Validity and Reliability

This research sought to establish two kinds of validity involving the Networking Skills Inventory: content validity and construct validity. The content validity was supported by the expert raters’ acceptance of all forty-five items as being statements of behaviors important in effective networking skills. The construct validity was established by using a factor analysis, based on 225 inventory respondents, which empirically loaded the items into three factors, using ±.50 as a minimum criterion for loading. (See Table 1 for full results of factor analysis.) Findings from the factor analysis led to revising the Networking Skills Inventory into its current format of twenty-four items.
Table 1. Factor Loadings

(Criterion for Loading ± .50)

<table>
<thead>
<tr>
<th>Question Number</th>
<th>Relevant Information</th>
<th>Track Record</th>
<th>Working Relations</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>0.67053</td>
<td>0.23683</td>
<td>0.00782</td>
</tr>
<tr>
<td>38</td>
<td>0.64922</td>
<td>-0.06250</td>
<td>0.21106</td>
</tr>
<tr>
<td>7</td>
<td>0.61960</td>
<td>0.11830</td>
<td>0.07198</td>
</tr>
<tr>
<td>17</td>
<td>0.61555</td>
<td>0.17295</td>
<td>-0.08077</td>
</tr>
<tr>
<td>37</td>
<td>0.58006</td>
<td>0.21222</td>
<td>0.14597</td>
</tr>
<tr>
<td>31</td>
<td>0.57786</td>
<td>0.14214</td>
<td>0.30160</td>
</tr>
<tr>
<td>40</td>
<td>0.57603</td>
<td>0.14158</td>
<td>0.18739</td>
</tr>
<tr>
<td>4</td>
<td>0.56453</td>
<td>0.12538</td>
<td>0.31302</td>
</tr>
<tr>
<td>13</td>
<td>0.53337</td>
<td>0.28706</td>
<td>0.06091</td>
</tr>
<tr>
<td>25</td>
<td>0.52716</td>
<td>0.18246</td>
<td>0.00520</td>
</tr>
<tr>
<td>26</td>
<td>0.51730</td>
<td>0.30918</td>
<td>0.25906</td>
</tr>
<tr>
<td>12</td>
<td>-0.01838</td>
<td>0.62516</td>
<td>0.17185</td>
</tr>
<tr>
<td>27</td>
<td>0.25887</td>
<td>0.57417</td>
<td>0.15235</td>
</tr>
<tr>
<td>45</td>
<td>0.24835</td>
<td>0.53733</td>
<td>0.07541</td>
</tr>
<tr>
<td>18</td>
<td>0.39183</td>
<td>0.53363</td>
<td>-0.06550</td>
</tr>
<tr>
<td>41</td>
<td>0.35887</td>
<td>0.52883</td>
<td>0.06526</td>
</tr>
<tr>
<td>21</td>
<td>1.04543</td>
<td>1.52800</td>
<td>0.08410</td>
</tr>
<tr>
<td>30</td>
<td>-0.03221</td>
<td>0.52624</td>
<td>0.31519</td>
</tr>
<tr>
<td>24</td>
<td>0.11368</td>
<td>0.50083</td>
<td>0.27981</td>
</tr>
<tr>
<td>32</td>
<td>0.38385</td>
<td>-0.05704</td>
<td>0.67489</td>
</tr>
<tr>
<td>20</td>
<td>0.19935</td>
<td>0.14291</td>
<td>0.64292</td>
</tr>
<tr>
<td>8</td>
<td>0.04978</td>
<td>0.12575</td>
<td>0.57680</td>
</tr>
<tr>
<td>29</td>
<td>1.40340</td>
<td>-0.05608</td>
<td>0.55695</td>
</tr>
<tr>
<td>35</td>
<td>0.16293</td>
<td>0.12663</td>
<td>0.54791</td>
</tr>
<tr>
<td>10</td>
<td>0.00452</td>
<td>0.19859</td>
<td>0.53490</td>
</tr>
<tr>
<td>36</td>
<td>1.11731</td>
<td>0.33628</td>
<td>0.51736</td>
</tr>
<tr>
<td>19</td>
<td>0.17841</td>
<td>0.17958</td>
<td>0.50026</td>
</tr>
</tbody>
</table>

The revised Networking Skills Inventory has a moderate internal consistency reliability (reliability coefficients of .86, .77, and .73 for the dimensions of relevant information, track record, and working relations, respectively), which, according to Nunnally (1978), is good for a newly designed instrument.

Therefore, the revised Networking Skills Inventory is a moderately valid and reliable instrument. The instrument measures what it purports to measure, as indicated by its content and construct validity, and it is an internally consistent and reliable test. As such, the Networking Skills Inventory can contribute to the training and development field by providing valid and reliable feedback on networking skills to workshop participants.
**Potential Uses**

The Networking Skills Inventory is versatile and can be used in many areas, levels, and ways in an organization. Following are some suggestions:

1. **Use with individuals.** At the individual level, the inventory can be useful to anyone who wants to develop personal and professional power and influence. Caution: Some caution should be used in teaching networking skills to employees in certain positions such as clerical or secretarial jobs. During the authors’ research it was found that the highly interactive nature of networking skills may be viewed in certain positions as not focusing on one’s job.

2. **Use with groups.** At the group level, the inventory can be used in intragroup team building as a means of feedback or as an orientation piece to introduce individual resources. It can also be used in intergroup team building to assess the employees’ ability to go beyond their functional area and to interact productively with people in other functional areas.

3. **Use at the organizational level.** The inventory can be used to determine profiles of different functional divisions and to compare these profiles with the particular divisions’ needs to influence others. It can also be used—with other measures—to determine an organization’s ability to deal with the outside environment.

4. **Use at the managerial level.** The Networking Skills Inventory is useful to managers who need to influence across functional areas and to project managers who are held responsible for results without being given the necessary authority to accomplish those results.

5. **Use in training.** The inventory can be used in training that deals with skills in management, negotiation, power, or influence.

**Administration**

The Networking Skills Inventory should be administered before any lecturette on the topic of networking is offered. Having participants complete the instrument before discussing networking will lessen their tendency to react to the items on the basis of how they perceive they are supposed to behave.

The Networking Skills Inventory should be introduced with an explanation that the instrument should be treated as a means to discover networking abilities. The instructions on the instrument should be reviewed with the participants and any questions should be answered before they complete the inventory.

**Scoring**

After completing the inventory, each participant should be asked to transfer the number he or she assigned to each item to the appropriate column on the Scoring Sheet and to total the three columns.
Before participants transfer their scores to the triangular model, they should be told briefly about how John P. Kotter’s work led to this inventory and about the three bases upon which leaders build influence (see Kotter, 1985). These three bases comprise the three dimensions of the networking model and profile. Participants should then be instructed to transfer scores to the Interpretation Sheet.

**INTERPRETATION OF SCORES**

Attention should be called to the definitions of the dimensions on the interpretation sheet. The administrator should review these with the participants and explain that all three dimensions are integral to networking, which is defined as “the ability to create and maintain an effective, widely based system of resources that works to the mutual benefit of oneself and others.” Through effective networking, business objectives are accomplished while one’s professional reputation is established and enhanced and growth opportunities for personal and professional development are tapped.

Participants should examine the size and shape of their networking triangles, which indicate several aspects of their current networking styles. They should be told that the bias of this model is that the larger the triangle, the more effective one is at networking. That is, the larger the triangle, the more actively and consciously the person probably engages in networking from a mutual-gain perspective. Also, the balance among the three dimensions is important. The more equal the three sides of the triangle, the more balanced is one’s networking focus. If one side is significantly larger or smaller than the others, conscious attention should be paid to the skills and behaviors that will build the dimension(s) of the small side(s).

More important than the participants’ actual scores is how the information derived from the size and shape of their triangles can be used to improve their networking effectiveness. If their dimensions are fairly balanced, they should review the Scoring Sheet and circle the lowest-scored item in each dimension. If there is a significant difference in the scores of any of the dimensions, they should review the dimension(s) that is/are most in need of improvement and circle one to three of the lowest-scored items. Once they have identified their lowest items, they should reread the item statements to determine behaviors on which they will want to place emphasis and concentration for improvement.

It is important that participants make a commitment to work on improving the behaviors contained in the items they identified. If time permits, the group can discuss strategies for improving skills. An action plan can be developed for participants to take home.

**Normative Data**

Many participants will be curious about how they compare with other people who have completed the Networking Skills Inventory. The 225 professionals who completed the inventory in its test phase covered a cross-section of industries and job classifications.
Fifty-one of these were from a financial-services institution. As Table 2 indicates, there was no significant difference between the financial-services group and the other respondents. Since the highest possible score was 40, the average scores of the test group were high.

**Table 2. Average Dimension Scores**

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Financial Group</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevant Information</td>
<td>28.18</td>
<td>27.59</td>
</tr>
<tr>
<td>Working Relations</td>
<td>33.57</td>
<td>33.13</td>
</tr>
<tr>
<td>Track Record</td>
<td>33.13</td>
<td>32.82</td>
</tr>
</tbody>
</table>

These normative data do not detract from the intended use and application of the instrument’s results, which are to use the participants’ findings to teach the concepts of networking. The instrument is not intended to be used diagnostically, but as a method for providing insights into one’s conscious use of networking skills and the behaviors that can be developed and enhanced to increase one’s effectiveness.

**Processing the Data**

After the participants have interpreted their scores and triangles, the following questions can be used to process the data:

1. What is your reaction to the size and shape of your triangle? What dimensions seem important to you and your networking ability? What particular items are especially important to you? What do you notice about the relationship among dimensions?
2. How does your profile compare with those of the rest of the group? How does it compare with your perception of the ideal profile? What do these comparisons suggest to you about your networking ability? What do they suggest about the group’s networking ability?
3. What generalizations can you make about networking? What generalizations can you make about the three dimensions and how they fit together to compose networking?
4. What specifically do you need to do to improve your networking skills? What dimension needs attention? How can you begin that process? What is one action you can take immediately?

In processing the data it is important to consider the following:

1. Generally, participants rate themselves higher than others would rate them. It may be useful to give participants blank inventories and suggest that they ask others to rate them for a clearer picture of their networking skills. If the
participants are an ongoing work group, ratings by other members could be included in the process.

2. It might be interesting to get a group profile of the model and have participants use that as a normative measure against which to compare their scores. In composing the group profile, individual scores should be kept anonymous unless the group requests otherwise.

3. Participants can work with partners or in small groups to plan back-home applications, action plans, and/or contracts.

REFERENCES


NETWORKING SKILLS INVENTORY

Beverly Byrum-Robinson and J. David Womeldorff

Instructions: In the blank preceding each statement, write the number that indicates how often you engage in the behavior described. Use the following key:

Almost Always = 5   Often = 4   Sometimes = 3   Seldom = 2   Almost Never = 1

1. I probe for underlying issues in a conversation.
2. My work is perceived as competent by others.
3. I take time to talk to people wherever I meet them.
4. I let people know that I remember something personal about them.
5. I make certain that my work fits into the larger picture.
6. I get along with personality styles other than my own.
7. I ask people about their desires and goals.
8. I “go the extra mile” in delivering a task or project on time.
9. I follow the rules of basic courtesy (e.g., being sensitive to others’ time, thanking people, giving social greetings).
10. I purposefully listen to the way others talk, and I use their language when I respond.
11. I look for options and alternatives to problems or issues.
12. I introduce myself to people who are new in the organization and/or whom I do not know.
13. I ask questions that expand the range of conversation.
14. I influence the decisions of others because of my track record.
15. I let people know I appreciate them when they help me.
16. I pick up information about the “culture” I am in at the time.
17. I obtain information before I proceed with a task.
18. I let people talk without interrupting them.
_____ 19. I use a system that helps me remember who people are and what they do.

_____ 20. I follow tasks through to completion.

_____ 21. I act to build and maintain a good reputation in my organization.

_____ 22. I encourage others to talk and give me information about their jobs (e.g., activities, responsibilities, pressures).

_____ 23. I meet my goals and objectives to my “client’s” satisfaction.

_____ 24. I use eye contact when others are talking to me.
NETWORKING SKILLS INVENTORY SCORING SHEET

Transfer your scores from the list of items to the following columns and add the scores for each of the columns:

<table>
<thead>
<tr>
<th>Relevant Information</th>
<th>Track Record</th>
<th>Working Relations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. ______</td>
<td>2. ______</td>
<td>3. ______</td>
</tr>
<tr>
<td>4. ______</td>
<td>5. ______</td>
<td>6. ______</td>
</tr>
<tr>
<td>7. ______</td>
<td>8. ______</td>
<td>9. ______</td>
</tr>
<tr>
<td>10. ______</td>
<td>11. ______</td>
<td>12. ______</td>
</tr>
<tr>
<td>13. ______</td>
<td>14. ______</td>
<td>15. ______</td>
</tr>
<tr>
<td>16. ______</td>
<td>17. ______</td>
<td>18. ______</td>
</tr>
<tr>
<td>19. ______</td>
<td>20. ______</td>
<td>21. ______</td>
</tr>
<tr>
<td>22. ______</td>
<td>23. ______</td>
<td>24. ______</td>
</tr>
</tbody>
</table>

RI Score: ______    TR Score: ______    WR Score: ______
NETWORKING SKILLS INVENTORY INTERPRETATION SHEET

Plot your scores on the triangle by drawing a dot on each of the three heavy lines inside the triangle to represent your score for each dimension. For example, your “relevant information” score should be plotted on the vertical line.

After the three dots are drawn, connect them with three straight lines. Now shade in the triangle you have drawn.
Networking is the ability to create and maintain an effective, widely based system of resources that works to the mutual benefit of oneself and others through the skill dimensions of using relevant information, having good working relations, and maintaining and communicating a good track record.

The three networking skill dimensions are explained below. They will aid you in determining which areas of your networking ability need enhancement.

1. *Relevant information.* This dimension relates to seeking information by learning and remembering who all the relevant parties to your job are and what different responsibilities, perspectives, and personalities they have. It also includes discerning where these responsibilities, perspectives, and personalities are in conflict, what goals and sources of power each group (or individual) has, and to what extent the group or individual is prepared to act on those goals and use that power.

2. *Working relations.* This dimension includes building and maintaining positive relationships with everyone on whose cooperation and input you depend in accomplishing your job. This can be done by engaging in activities that yield respect, admiration, and friendship—such as addressing people’s needs, being considerate, and showing appreciation.

3. *Track record.* This refers to developing a reputable performance record that demonstrates credibility. You can build a good track record by doing competent work that involves excellent problem solving, decision making, and implementation in a timely manner.

The size and shape of your networking triangle indicates several aspects of your current networking style. First, the larger your triangle, the more actively and consciously you probably engage in networking from a mutual-gain perspective. Second, the more equal the sides of your triangle, the more balanced is your networking focus and the better the dimensions are working together.

The bias of this model is that the larger the triangle, the more effective you are at networking. The balance between the three dimensions is also important. If one side is significantly larger or smaller than the others, pay attention to the skills and behaviors that make up the dimension(s) of the small side(s).

More important than your actual scores is how the information derived from the size and shape of your triangle can be used to improve your networking effectiveness. If your dimensions are fairly balanced, you may want to review your scoring sheet and circle the lowest-scored item in each dimension. If there is a significant difference in the scores of any of the dimensions, review the dimension(s) that is/are most in need of improvement and circle one to three of the lowest-scored items. Once you have identified your lowest items, reread the item statements to determine behaviors on which you will want to place emphasis and concentration for improvement.
THE PERSONAL VALUE STATEMENT (PVS): AN EXPERIENTIAL LEARNING INSTRUMENT

John E. Oliver

For several years, Allport, Vernon, and Lindzey’s (1960) *Study of Values* has been used to aid students of organizational behavior in learning about personal values and their impact on the behavior of people in organizations. The Study of Values instrument also is used as a managerial and professional-selection tool and in career counseling. A considerable body of research evidences its reliability and validity. However, two problems arise in using the Study of Values instrument as an experiential learning device: first, the form is copyrighted and must be ordered from the publisher; second, the time needed to administer and score the instrument often exceeds one hour.

In order to overcome the expense and time problems associated with the Study of Values, a shorter instrument, the Personal Value Statement (PVS), has been developed. This instrument is based on Eduard Spranger’s (1929) book *Types of Men*, which also served as the basis for Allport, Vernon, and Lindzey’s instrument.

Spranger’s theory describes six, basic value systems that motivate people to think and act as they do: political, aesthetic, social, theoretical, economic, and religious. This article will describe the Personal Value Statement, its underlying theory, and its psychometric properties and will present possible topics for training discussions to enhance the use of the instrument.

THE PERSONAL VALUE STATEMENT

The PVS questionnaire contains twenty items. Each item is a group of three nouns that reflect common aspects of various value systems. For instance, the words “power,” “control,” “conquest,” and “influence” are found in items 1, 6, 11, and 16 and represent some aspects of the “political” value system. The respondent is asked to rank the words in the order of their importance.

Scoring

Five scores are computed. Each represents the relative strength of one of Spranger’s value systems, excluding “religious.” Scores are computed by transferring numerical rankings of the words from the instrument form to the Scoring Sheet and totaling the responses in each column on the Scoring Sheet. Thus, the “political” score will be a total of all the ranks assigned to the twelve words that refer to political values. The four remaining value scores (aesthetic, social, theoretical, and economic) are computed.
similarly. The scores are then ranked from highest to lowest to reveal the respondent’s primary value system(s).

**Test Results**

Because the PVS is intended as a learning device in organizational behavior, a sample of 160 students of organizational behavior (112 undergraduates and forty-eight graduate students) was analyzed to determine the acceptability of the form and to establish an initial set of norms. One group of thirty undergraduates was retested one week later, with no discussion of the form or theory between administrations, in order to estimate test-retest reliability.

Table 1 shows the mean scores, standard errors of measurement, standard deviations, and reliability estimates for the student sample. Students in this sample ranked social or humanitarian values highest, economic values second highest, theoretical values third, political values fourth, and aesthetic values lowest. Internal consistency as measured by coefficient alpha averaged .56, and test-retest reliability was estimated to average .66 for the five scales.

**Table 1. Descriptive Statistics, Organizational Behavior Students (N=160)**

<table>
<thead>
<tr>
<th></th>
<th>Political</th>
<th>Aesthetic</th>
<th>Social</th>
<th>Theoretical</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Possible Range</td>
<td>12-36</td>
<td>12-36</td>
<td>12.36</td>
<td>12-36</td>
<td>12-36</td>
</tr>
<tr>
<td>Actual Range</td>
<td>12-33</td>
<td>14-32</td>
<td>17-36</td>
<td>16-34</td>
<td>18-34</td>
</tr>
<tr>
<td>Mean</td>
<td>22.70</td>
<td>20.30</td>
<td>26.70</td>
<td>23.80</td>
<td>26.40</td>
</tr>
<tr>
<td>Rank</td>
<td>4</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Standard Error</td>
<td>.30</td>
<td>.30</td>
<td>.40</td>
<td>.30</td>
<td>.20</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>3.90</td>
<td>3.20</td>
<td>4.40</td>
<td>3.60</td>
<td>3.10</td>
</tr>
<tr>
<td>Coefficient Alpha*</td>
<td>.62</td>
<td>.49</td>
<td>.74</td>
<td>.58</td>
<td>.38</td>
</tr>
<tr>
<td>Test-Retest*</td>
<td>.63</td>
<td>.52</td>
<td>.77</td>
<td>.70</td>
<td>.68</td>
</tr>
</tbody>
</table>

*All significant at p < .001; n = 30

Frequency distributions of scores in the student sample are shown in Table 2 so that respondents can compare their scores with this normative sample.

Table 3 indicates that the five scales are negatively correlated to varying degrees. Both the theory and the design of the instrument would predict this to be the case.

Construct validity of the theory and the items was established by correlating each of the value words with the five total scores. Words that were chosen to represent each value system correlated positively (in the range of .3 to .6) with the total score representing its related construct (value type) and either negatively or zero with the other construct scores. For example, the word “power” correlated .51 with the political score and −.22, −.33, .03, and .08 with the aesthetic, social, theoretical, and economic scores.
### Table 2. Frequency Distributions, Numbers, and Cumulative Percentiles (N=160)

<table>
<thead>
<tr>
<th>Score</th>
<th>Political</th>
<th>Aesthetic</th>
<th>Social</th>
<th>Theoretical</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
<td>Percent</td>
<td>Number</td>
</tr>
<tr>
<td>12</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>14</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>15</td>
<td>2</td>
<td>3</td>
<td>8</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>4</td>
<td>5</td>
<td>10</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>17</td>
<td>7</td>
<td>9</td>
<td>12</td>
<td>19</td>
<td>1</td>
</tr>
<tr>
<td>18</td>
<td>7</td>
<td>2</td>
<td>15</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>19</td>
<td>10</td>
<td>2</td>
<td>18</td>
<td>40</td>
<td>3</td>
</tr>
<tr>
<td>20</td>
<td>14</td>
<td>29</td>
<td>24</td>
<td>55</td>
<td>1</td>
</tr>
<tr>
<td>21</td>
<td>15</td>
<td>38</td>
<td>24</td>
<td>70</td>
<td>9</td>
</tr>
<tr>
<td>22</td>
<td>21</td>
<td>51</td>
<td>15</td>
<td>79</td>
<td>9</td>
</tr>
<tr>
<td>23</td>
<td>14</td>
<td>60</td>
<td>11</td>
<td>86</td>
<td>11</td>
</tr>
<tr>
<td>24</td>
<td>15</td>
<td>69</td>
<td>7</td>
<td>91</td>
<td>17</td>
</tr>
<tr>
<td>25</td>
<td>9</td>
<td>75</td>
<td>5</td>
<td>94</td>
<td>17</td>
</tr>
<tr>
<td>26</td>
<td>11</td>
<td>82</td>
<td>4</td>
<td>96</td>
<td>11</td>
</tr>
<tr>
<td>27</td>
<td>10</td>
<td>88</td>
<td>1</td>
<td>97</td>
<td>7</td>
</tr>
<tr>
<td>28</td>
<td>4</td>
<td>91</td>
<td>2</td>
<td>98</td>
<td>14</td>
</tr>
<tr>
<td>29</td>
<td>10</td>
<td>97</td>
<td>1</td>
<td>99</td>
<td>9</td>
</tr>
<tr>
<td>30</td>
<td>2</td>
<td>98</td>
<td>0</td>
<td>99</td>
<td>10</td>
</tr>
<tr>
<td>31</td>
<td>1</td>
<td>99</td>
<td>0</td>
<td>99</td>
<td>10</td>
</tr>
<tr>
<td>32</td>
<td>1</td>
<td>99</td>
<td>2</td>
<td>100</td>
<td>11</td>
</tr>
<tr>
<td>33</td>
<td>1</td>
<td>100</td>
<td>3</td>
<td>92</td>
<td>1</td>
</tr>
<tr>
<td>34</td>
<td>5</td>
<td>95</td>
<td>1</td>
<td>100</td>
<td>1</td>
</tr>
<tr>
<td>35</td>
<td>4</td>
<td>97</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>4</td>
<td>100</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Table 3. Scale Intercorrelations

<table>
<thead>
<tr>
<th></th>
<th>Aesthetic</th>
<th>Social</th>
<th>Theoretical</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Political</td>
<td>−.17</td>
<td>−.43</td>
<td>−.09</td>
<td>−.18</td>
</tr>
<tr>
<td>Aesthetic</td>
<td>−.29</td>
<td></td>
<td>−.29</td>
<td>−.17</td>
</tr>
<tr>
<td>Social</td>
<td>−.30</td>
<td></td>
<td>−.26</td>
<td></td>
</tr>
<tr>
<td>Theoretical</td>
<td>−.25</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Convergent validity with the Study of Values instrument was established by having a sample of thirty-two students simultaneously complete both the Study of Values and the Personal Value Statement. The two political scales correlated .40 (p < .01); aesthetic scores correlated .39 (p < .05); social scores correlated .35 (p < .02); theoretical scores correlated .44 (p < .005); and economic scores correlated .31 (p < .04).
**Interpretation**

Because scores from the PVS are ordinal measurements, each score must be interpreted as a relative score rather than as an absolute one and, hence, not comparable to any other scores. For example, two people who have the same score on the social (or humanitarian) values scale cannot necessarily be said to have equal humanitarian values. For this reason, scores are converted to ranks. This conversion allows rank scores from the PVS to be compared with rank scores from the Study of Values (these can be found in research reports such as Guth and Tagiuri [1965]; Allport, Vernon, and Lindzey [1970]; and Lusk and Oliver [1974]).

**DISCUSSION TOPICS**

**Measurement**

After administering and scoring the PVS in a training or organization development session, it may be appropriate to discuss measurement concepts such as the meaning and value of descriptive statistics, the normal distribution, measurement levels, reliability, and validity. Such a discussion helps the trainees to evaluate the usefulness of their PVS scores and also reinforces their understanding of these concepts.

This may be the first time that some participants have evaluated information about themselves. They may ask whether employers, counselors, or others will have access to the information generated by the instrument. They should be assured that no one will have access to these data.

**Personal Values**

A lecturette on individual values will help to focus the activity. This can be based on the research findings of Rokeach (1973), which indicate that values are learned beliefs. Individuals learn them from their culture in general and, more specifically, from their family, religion, peers, educators, and experiences. Values are part of our personalities and cognitive systems; they direct how we behave (react to stimuli) and what we think. Values are evidenced by attitudes, and these vary by race, age, sex, religion, income, and education. Rokeach was able to measure values reliably using the Rokeach Value Statement.

Other people also have contributed to our understanding of how values influence behavior in organizational settings. Peterson (1972) used cluster analysis to establish the cultural variability of values. Guth and Tagiuri (1965), using Allport, Vernon, and Lindzey’s Study of Values, found that American business managers ranked political values highest, followed by economic and theoretical values, with religious and aesthetic scores lower, and social values ranked lowest of all. Lusk and Oliver (1974) replicated the Guth and Tagiuri study almost ten years later and found little change, indicating that, for vocational groups at least, values tend to be stable over time. England (1975), using
the Personal Value Questionnaire, also found managers to be pragmatic and achievement oriented and has discussed how values influence corporate strategy and decision making. Ferber (1967) states that decision making could be more rational if managers were trained to be aware of how their values influence their decisions.

**Spranger’s Value Types**

*Political.* The political value is characterized by the pursuit of power. People at the top levels of any organization probably were led there by their desire for power. People with a high power motive seek influence, personal prestige, control, authority, strength, and the other trappings of power described by the words in the “political” rows on the PVS. The political person recognizes the relationship between money and power and may measure success in dollars; however, the ultimate goal is position. This type of person joins clubs with the ultimate goal of becoming the presiding officer, works for advancement and promotion opportunities, and also desires social status and recognition.

*Aesthetic.* People who possess a high degree of the aesthetic value seek beauty, symmetry, and harmony. They are interested in the artistic episodes of life. Style and charm may be more important to them than practicality. They believe in the dignity of man and the nobility of the individual. Hence, they may be self-sufficient and individualistic. One need not be an artist to value art and culture. Taste, appearance, and elegance are signs of refinement sought by the aesthete, and money is seen as a necessary means to those ends. The pomp and pageantry of position and power also may be important to the aesthete. One cannot associate with just anyone or belong to just any club. A “good” address, the “best” schools, traveling first class, and entertaining well are necessities. The aesthete does not sponsor a fish fry or a barbecue; a lavish formal dinner is more the style. Affluence can provide the finer things in life, and the aesthete’s sense of taste, decorum, and style fit well in such an environment.

*Social.* The social or humanitarian value indicates love of fellow beings. This does not necessarily characterize people who are outgoing but reflects a humanitarian concern for the welfare of others. A social person tends to be kind, sympathetic, warm, and giving; such a person values charity, unselfishness, and the freedom of others and is apt to offer aid and assistance to others as well as understanding. To be able to contribute to another’s happiness and well-being is the altruistic goal of the humanitarian. To act for materialistic gain without first considering the consequences of the act for other people is against the nature of the social person. The cold and unsympathetic nature of some of the other types of people is abhorrent or frightening to the social person.

*Theoretical.* Theoretical people value truth and knowledge above all else. To think, to learn, to reason, to probe, to analyze, and to explain are important to them. Because they are critical, logical, and empirical, they tend to value science, research, information, and theory. Not only knowledge, but the organization and cataloging of knowledge are important to them. They tend to be detached and unemotional as they seek to solve problems, develop theories, and form questions; and their critical natures may cause
them to be regarded negatively by some members of the organization. Theoretical people recognize that knowledge is power but may not recognize the importance of emotional appeal, especially to aesthetic and social individuals. A theoretical person may become frustrated at the failure of others to realize the value of knowledge and theory but also may fail to recognize the need for more practical solutions.

Economic. Practicality and usefulness are important to the economic person. Unlike the theoretical person, the economic type has no use for knowledge that is not immediately applicable to pragmatic achievement, to the production of something tangible and useful. Efficiency and effectiveness are measured by profit and prosperity. Because these people value efficiency, they tend to be parsimonious and may be perceived by aesthetic and social individuals as stingy or selfish. The economic practice of conserving resources stems from the feeling that life is a struggle and that self-preservation requires that resources be used wisely. However, if convinced of the practical value of aesthetics, the economic individual may mistake luxury for beauty, with results that are perceived by others to be gaudy. The economic individual also may judge the value of others by their wealth or income as well as their ability to produce. In pursuing goals or achievements, the economic individual tends to take risks in order to minimize input. Economic-type students tend to be more concerned with making the necessary grades and obtaining their degrees as soon and as easily as possible than they are with acquiring knowledge that may not be immediately useful.

Religious. People who hold high religious values tend to forsake empiricism and logic for faith in an unseen power. Spranger speaks of the religious person as a mystic, a seeker of unity with the totality of nature. Life may be seen as a divine creation, planned and executed by a higher, guiding order. Self-denial, prayer, and meditation may be valued, or life itself may be the vehicle for achieving ultimate unity through experience and expression.

Although Spranger described six pure value types, he noted that any individual could hold a combination of several types of values.

Only five of Spranger’s (1929) six value types are used in the PVS; the religious value is not included because of the difficulty of finding enough suitable words to describe what this value means to different people. Although this may be a shortcoming of the PVS, Spranger’s selection of six value systems obviously excludes others, such as the sensuous, hedonistic, and expedient values identified by Allport, Vernon, and Lindzey (1960). Because the PVS is used to teach and learn about value systems by studying relative intensities, the exclusion of some possible value systems can serve as another topic for discussion.

Examples

Another way to stimulate the interest and involvement of trainees is to solicit examples of people or positions that personify each value type. Typical examples of the political type include Adolf Hitler, a college president, and the Pope. Examples of aesthetes include poets, artists, and Queen Elizabeth. Examples of social people include priests,
social workers, philanthropists, and Mother Teresa. Professors, scientists, librarians, Albert Einstein, and Sir Isaac Newton frequently are cited as examples of theoreticians. Businessmen, engineers, J. Paul Getty, and Howard Hunt often are listed as examples of the economic type. Monks, nuns, clergymen, Timothy Leary, and Charles Manson may be listed as examples of the religious individual.

**Combinations of Values**

Some combinations of values appear to be congruent and mutually supportive and others appear to conflict to varying degrees. For example, political and aesthetic values might be found in one individual simultaneously, perhaps in combination with theoretical values. In such a case, one might expect social and economic values to be ranked lower; however, this is not always true. Almost any combination may be found. Several combinations are described here to illustrate the diversity of patterns and the conflicting nature of some combinations.

**Political and Aesthetic.** This sometimes pompous individual believes in the “divine right of rulers,” especially himself or herself. Like General George Patton, who saw himself as the reincarnation of Alexander the Great, such people may believe that they were meant to serve some grand purpose. They are likely to be individualistic, express their beliefs freely, and resist any attempt to control their actions.

**Political and Social.** This benevolent ruler seeks power in order to oversee the well-being of others. By developing paternalistic relationships with others, this person serves them through strength, much as the Pope serves the Church.

**Political and Theoretical.** Knowledge is the source of power that provides recognition, influence, and control over others for this intellectual or scientific leader who regards other people as objects to be analyzed and manipulated.

**Political and Economic.** This individual finds that the position of line, rather than staff, serves his or her goals of economic success, power, and position. The typical, successful, American businessperson is an example of someone with these values.

**Aesthetic and Social.** This altruistic soul instinctively knows what is right for humanity. Such a person artistically dramatizes emotion and concern for the welfare of others with lofty prose.

**Aesthetic and Theoretical.** This may be the most conflicted combination of values. Theoretically, such a person simultaneously would be searching for thorough logic and explanations while relying on feelings and impressions to provide beauty.

**Aesthetic and Economic.** To be practical and efficient while possessing style and beauty also may create conflict, and the person who typifies this pattern is associated with commerce only at the highest cultural levels.

**Social and Theoretical.** This individual is the professional who seeks to serve others through knowledge. Even though others may find such a person’s critical analyses of people to be cold, the person does strive to help others to become more rational.
Social and Economic. For this individual, the goals of productivity and satisfaction are equally important and he or she encourages economic opportunity because it benefits people.

Theoretical and Economic. Because this person is interested in practical applications of knowledge, he or she tends to be inventive. This pragmatic approach to science produces an eclectic problem solver rather than a theoretician.

Allport, Vernon, and Lindzey’s Group Norms

Table 4 shows the ranks, sample size, and sample descriptions for Allport, Vernon, and Lindzey’s (1960) groups of several diverse samples. It is evident that value profiles vary by career choice, sex, school or business situation, and location. Other studies have shown that some types of college programs effect changes in value profiles to align them with career choices and that tests administered to students in such programs can predict career choice.

Effect of Values on Case Decisions

One way to extend the use of awareness resulting from the PVS is to ask participants to solve a case problem, then to analyze their results with respect to the impact of their own values. For instance, in a case that requires participants to decide which employees to lay off, the employees should be described in terms of their abilities, problems, ages, family situations, sexes, handicaps, races, health, religions, values, and so on. Participants can be asked why they selected certain individuals for layoff and how their own values affected their selections.

Additional Discussion Topics

The following questions can be effective in generating discussion following administration of the PVS.

1. Guth and Tagiuri (1965) found that American managers tend to score high in political and economic values and low in social values. What kinds of values should managers have?

2. How can knowledge of employee values aid managers?

3. Do employees today have different values than workers did fifty years ago? How do these values differ? How or why is this good or bad for society?

4. How might your specific values affect your performance as a manager?

5. What other values types are there that have not been identified by the PVS?
Table 4. Allport, Vernon, and Lindzey’s (1960) Value Rankings for Different Student and Occupational Groups

<table>
<thead>
<tr>
<th>Sample</th>
<th>n</th>
<th>Political</th>
<th>Aesthetic</th>
<th>Social</th>
<th>Theoretical</th>
<th>Economic</th>
<th>Religious</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male business students, Boston University</td>
<td>173</td>
<td>2</td>
<td>6</td>
<td>4</td>
<td>3</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Male MBA students, Harvard University</td>
<td>508</td>
<td>2</td>
<td>4</td>
<td>6</td>
<td>3</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Southern business students (M/F)</td>
<td>160</td>
<td>4</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>—</td>
</tr>
<tr>
<td>Southern businessmen</td>
<td>49</td>
<td>3</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Female business students, Radcliffe College</td>
<td>77</td>
<td>2</td>
<td>1</td>
<td>6</td>
<td>5</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Female students, unidentified Southern college</td>
<td>98</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>6</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Male medical students</td>
<td>1000</td>
<td>2</td>
<td>3</td>
<td>6</td>
<td>1</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Male personnel and guidance workers</td>
<td>217</td>
<td>4</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Female personnel and guidance workers</td>
<td>91</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Male engineering students</td>
<td>508</td>
<td>3</td>
<td>6</td>
<td>5</td>
<td>1</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Male art and design students, Rhode Island School of Design</td>
<td>180</td>
<td>5</td>
<td>1</td>
<td>6</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Female art and design students, Rhode Island School of Design</td>
<td>168</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>4</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>Male U.S.A.F. officers, Maxwell Air Force Base</td>
<td>61</td>
<td>1</td>
<td>6</td>
<td>5</td>
<td>3</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Clergymen</td>
<td>26</td>
<td>3</td>
<td>5</td>
<td>2</td>
<td>4</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Male high school teachers, Wisconsin</td>
<td>126</td>
<td>4</td>
<td>6</td>
<td>5</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Male high school administrators, Wisconsin</td>
<td>126</td>
<td>4</td>
<td>6</td>
<td>5</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Female nurses</td>
<td>53</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Female social workers</td>
<td>33</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Males, general college population</td>
<td>5894</td>
<td>1</td>
<td>6</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Females, general college population</td>
<td>2475</td>
<td>4</td>
<td>1</td>
<td>3</td>
<td>6</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>General college population</td>
<td>8369</td>
<td>—</td>
<td>about even</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
</tbody>
</table>
CONCLUSION

The Personal Value Statement (PVS) is a convenient, quickly scored, experiential learning instrument that can serve as a basis for discussing personal values in general and Spranger’s six types of values specifically, as well as related topics. The instrument is not designed for use as a counseling, placement, or selection tool. Its psychometric properties are sufficient for use in training, and there is considerable evidence of the validity of the theories on which it is based. It is suggested that trainers using the PVS develop case studies, discussion topics, and other activities to complement their own purposes and situations.

REFERENCES

# THE PERSONAL VALUE STATEMENT (PVS)

**John E. Oliver**

*Instructions:* For each of the following groups of three words, place a 3 by the word that is most important to you and a 1 by the word that is least important to you. Place a 2 by the remaining word.

<table>
<thead>
<tr>
<th>Group</th>
<th>Word 1</th>
<th>Word 2</th>
<th>Word 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>a. Power</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Style</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. People</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>a. Thinking</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Practicality</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Winning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>a. Taste</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Unselfishness</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Reason</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>a. Tangibility</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Overcoming</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Appearance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>a. Helping</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Science</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Efficiency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>a. Control</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Charm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Kindness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>a. Knowledge</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Utility</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Position</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>a. Culture</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Warmth</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>a. Usefulness</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Command</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Refinement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>a. Aid</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td>a. Conquest</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Art</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Sympathy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td>a. Learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Production</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Strength</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13.</td>
<td>a. Harmony</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Giving</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Solutions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.</td>
<td>a. Prosperity</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Struggles</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15.</td>
<td>a. Understanding</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Logic</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Wealth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16.</td>
<td>a. Influence</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Elegance</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Charity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17.</td>
<td>a. Explanation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Profit</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Authority</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18.</td>
<td>a. Symmetry</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Freedom</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Theories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19.</td>
<td>a. Effectiveness</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Privilege</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Beauty</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20.</td>
<td>a. Assistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Beauty</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PERSONAL VALUE STATEMENT SCORING SHEET

Instructions: Enter your scores from the PVS form in the spaces below. Then add the scores in each column and enter the total for the column in the space provided.

<table>
<thead>
<tr>
<th>VALUES</th>
<th>Political</th>
<th>Aesthetic</th>
<th>Social</th>
<th>Theoretical</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>1b</td>
<td>1c</td>
<td>2a</td>
<td>2b</td>
<td></td>
</tr>
<tr>
<td>6a</td>
<td>6b</td>
<td>6c</td>
<td>7a</td>
<td>7b</td>
<td></td>
</tr>
<tr>
<td>11a</td>
<td>11b</td>
<td>11c</td>
<td>12a</td>
<td>12b</td>
<td></td>
</tr>
<tr>
<td>16a</td>
<td>16b</td>
<td>16c</td>
<td>17a</td>
<td>17b</td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>3a</td>
<td>3b</td>
<td>3c</td>
<td>4a</td>
<td></td>
</tr>
<tr>
<td>7c</td>
<td>8a</td>
<td>8b</td>
<td>8c</td>
<td>9a</td>
<td></td>
</tr>
<tr>
<td>12c</td>
<td>13a</td>
<td>13b</td>
<td>13c</td>
<td>14a</td>
<td></td>
</tr>
<tr>
<td>17c</td>
<td>18a</td>
<td>18b</td>
<td>18c</td>
<td>19a</td>
<td></td>
</tr>
<tr>
<td>4b</td>
<td>4c</td>
<td>5a</td>
<td>5b</td>
<td>5c</td>
<td></td>
</tr>
<tr>
<td>9b</td>
<td>9c</td>
<td>10a</td>
<td>10b</td>
<td>10c</td>
<td></td>
</tr>
<tr>
<td>14b</td>
<td>14c</td>
<td>15a</td>
<td>15b</td>
<td>15c</td>
<td></td>
</tr>
<tr>
<td>19b</td>
<td>19c</td>
<td>20a</td>
<td>20b</td>
<td>20c</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>Total</td>
<td>Total</td>
<td>Total</td>
<td>Total</td>
<td>Total</td>
</tr>
<tr>
<td>Rank</td>
<td>Rank</td>
<td>Rank</td>
<td>Rank</td>
<td>Rank</td>
<td>Rank</td>
</tr>
</tbody>
</table>
Psychological maturity is defined as the extent to which a person acts independently, is able and willing to take responsibility, and desires to achieve (Hersey & Blanchard, 1969). This concept has several important implications for managerial action in areas such as relationships between managers and subordinates, socialization efforts used by organizations, and individual performance levels.

In terms of manager-subordinate relationships, psychological maturity may be an important variable for a manager to consider when determining the behavioral style that he or she uses with a particular subordinate. Therefore, psychological maturity may be an important moderator of managerial behavior. This is a key element of the Situational Leadership® theory developed by Hersey and Blanchard (1982), which suggests that the style of managerial behavior (that is, a combination of task and relationship behavior) must be appropriate for the level of maturity of the particular subordinate involved. One aspect of maturity is psychological (that is, independence, ability and willingness to take responsibility, and motivation to achieve). To apply the prescriptions of the Situational Leadership® theory, a manager must take into account and be able to evaluate the level of each subordinate’s psychological maturity.

In addition, psychological maturity is an important consideration in manager-subordinate relations in that it may serve as a substitute or supplement for managerial behavior (Howell, Dortman, & Kerr, 1986; Kerr & Jermier, 1978). For example, a subordinate with a very high level of psychological maturity is very independent, highly willing to work, and oriented toward high achievement in his or her job. Such a subordinate might need little direction or attention from the manager; in fact, if certain managerial behaviors were used with this type of subordinate, these behaviors might be unnecessary or redundant (Howell, Doorman, & Kerr, 1986; Kerr & Jermier, 1978). Consequently, managers who are able to assess the level of each subordinate’s psychological maturity are better able to determine the extent to which their managerial efforts will facilitate—or get in the way of—subordinate activities.

Psychological maturity also may be an important factor with regard to socialization efforts used by organizations. Such efforts are designed to integrate individual and organizational interests so that individual performance levels are high and career advancement is satisfactory (Louis, 1980; Schein, 1968). The initial socialization practices that organizations use, which are critical to achieving the desired integration between the individual and the organization (Wanous, 1977), aim at imparting pivotal and relevant values to the individual (Schein, 1968). Among these values are expected performance levels to be achieved, required work-related roles that need to be fulfilled,
and expectations regarding social interactions among organizational members (for example, norms governing interpersonal relations).

It seems reasonable that the level of psychological maturity of an individual may be a factor in determining the extent to which an organization has to attend to socialization efforts. An individual with a high level of motivation to achieve and a high degree of willingness to take responsibility and to work on his or her own might need less socialization attention with regard to the expected performance norms within an organization. Such a person might be expected to “learn the ropes” and to seek out and complete work requirements on his or her own. Consequently, organizations that are able to discriminate among individuals in terms of psychological maturity should be able to make better use of their resources for socialization efforts.

Finally, psychological maturity has implications for individual performance levels. Ability and willingness to work are commonly argued as determinants of performance (for example, Campbell & Pritchard, 1976; Porter & Lawler, 1968; Vroom, 1964). Employees with a low level of psychological maturity might be unwilling to put forth the necessary effort to accomplish tasks, whereas employees with a high level of psychological maturity might be quite willing and have a great desire to expend the effort required to achieve high levels of performance. Thus, organizations that can identify and evaluate an individual’s level of psychological maturity should be better able to meet organizational goals and to respond to critical performance demands.

The importance of an organization’s ability to assess psychological maturity suggests the need for a valid and reliable instrument for this purpose. The Psychological Maturity Instrument (PMI), which is described in the following paragraphs, was designed to be used in this way.

**THE INSTRUMENT**

The Psychological Maturity Instrument (PMI) consists of eleven equally weighted items designed to measure the three dimensions of psychological maturity that are described in the preceding paragraphs (independence, ability and willingness to take responsibility, and motivation to achieve). Empirical examination of the eleven items indicates that the three dimensions are not statistically independent and, therefore, that the items represent a single, overall measure of psychological maturity. Each item requires a response on the basis of a seven-point scale: 1 = Almost Never, 3 = Sometimes, 5 = Often, and 7 = Almost Always (2, 4, and 6 are included in the scale but are not labeled).

**Reliability and Validity of the PMI**

The PMI was developed following instrument-construction procedures suggested by Nunnally (1978). As part of the instrument’s development, it was administered to three independent samples. Analysis of these results suggested that the instrument has adequate internal consistency.
The instrument was administered to a sample of eighty-four full-time managers participating in evening master’s degree (MBA) programs at two different universities. Each manager completed the instrument for a randomly selected subordinate. The random selection minimized the possibility of bias in evaluating a subordinate with regard to psychological maturity. It also provided a potentially wider range of psychologically mature subordinates on which to assess the utility of the instrument. This resulting manager psychological maturity rating (MPMR) had an acceptable reliability coefficient (Cronbach’s alpha >.70).

The instrument was also administered to two independent samples from two different university residence-hall programs. Participants were full-time hall directors (professionals with master’s degrees in personnel) and part-time residence-hall advisors (paraprofessional graduate and undergraduate students). In these samples the instrument was completed from three perspectives. Each hall director (manager) completed the instrument for each of his or her subordinates, thereby generating a MPMR. Each residence-hall advisor (subordinate) completed the instrument for all other residence advisors in his or her hall, thereby generating a peer psychological maturity rating (PPMR). In addition, each residence-hall advisor also rated his or her own psychological maturity by completing the instrument for himself or herself, thereby generating a self psychological maturity rating (SPMR).

The instrument showed adequate internal consistency from all three rating sources in both samples. In the first sample (fifteen hall directors and 148 residence advisors, n = 163) the Cronbach’s alphas were .88 for MPMR, .92 for PPMR, and .79 for SPMR. In the second sample (twelve hall directors and 204 residence-hall advisors, n = 216), the Cronbach’s alphas were .94 for MPMR, .97 for PPMR, and .84 for SPMR.

The convergent validity of the PMI was examined in terms of the zero order correlations among the three rating sources in each sample. In both samples the MPMR and PPMR were significantly and positively correlated (r = .53, p < .01 in the first sample; r = .34, p < .01 in the second sample). Thus, the most “objective” raters of a person’s maturity (that is, peers) and managers converged in their assessments of subordinate psychological maturity. The correlations between SPMR and MPMR were nonsignificant in both of the samples. This suggests that managers and subordinates may view subordinate psychological maturity differently. The correlations between SPMR and PPMR were inconsistent across the two samples. In the first sample there was a significant, positive (although modest) relationship between these two rating scores (r = .20, p < .05). In the second sample the relationship was nonsignificant. No clear explanation exists to interpret these inconsistent results.

The concurrent validity of the PMI was examined by analyzing the zero order correlations between subordinate performance and psychological maturity from each rating source. Managers provided a performance rating for each of their subordinates using a five-point scale (1 = poor to 5 = outstanding). Results indicate that performance was significantly and positively correlated with MPMR and PPMR in both samples (r = .55 and .47, p < .01, respectively, for MPMR and PPMR in the first sample; r = .64 and
.47, p < .01, respectively, for MPMR and PPMR in the second sample). There was no significant relationship between performance and the SPMR in either sample. Thus, ratings from managers and peers suggest concurrent validity of the PMI with performance.

**Administering the PMI**

The PMI is administered simply by having respondents complete the eleven-item instrument. A manager can complete it to assess subordinates’ psychological maturity; a subordinate can complete it to assess the psychological maturity of his or her peers; or a subordinate can complete it to assess his or her own psychological maturity. Given the reliability and validity information reported in the preceding section, it would seem most prudent not to have the PMI completed only by the subordinate for himself or herself. The subordinate’s ratings are, however, potentially useful, depending on the purpose of using the PMI.

When managers or peers complete the PMI, it is best to use the multiple-rater form and the corresponding matrix scoring sheet. (A subordinate who is evaluating only himself or herself should use the self-rating form and does not need a matrix scoring sheet.) Managers and peers should be instructed to complete each item of the PMI in turn for all individuals being evaluated as opposed to completing all items in succession for each person. This facilitates the respondent’s ability to discriminate the levels of psychological maturity among different people being evaluated. It takes just a few minutes to complete the PMI for a single person. However, the time required for a manager or peers to complete the PMI will depend on the number of individuals being evaluated.

The PMI is most effectively presented by asking respondents to complete the instrument for those individuals who will be involved (subordinates, peers, and self) in terms of the individual’s current job responsibility. Depending on the objectives for using the instrument, additional instructions may be given. The PMI is useful in at least three different types of situations:

1. **When managers would like greater insight into what might be more appropriate behavioral styles to use with their subordinates.** For example, such insight is useful to managers when they are attempting to use the prescriptions of the Situational Leadership® theory. In this case the managers should be instructed to complete the instrument by carefully thinking about the work-related activity of each subordinate in terms of each item in the PMI. Because any single manager is subject to perceptual bias based on a variety of factors (Krech, Crutchfield, & Ballachey, 1962), it might also be useful to have subordinates’ peers complete the PMI. This provides an additional source of data about subordinates that managers can use as a check for their own perceptions. In this way the manager can make a more effective determination about the appropriate behavioral style to use with any subordinate.
2. When personnel departments and managers of new employees want to determine what formal socialization efforts are necessary. In this case those who have interviewed or otherwise appraised a new employee should be instructed to complete the PMI based on what the rater perceives to be the employee’s potential capability in terms of each item. Because several sources would probably provide ratings in this category, a relatively “objective” rating would be obtained.

3. When evaluating performance. In this case both the manager’s and the subordinate’s own ratings might be useful. Both of these rating sources should be instructed to complete the PMI in terms of the current level of work performance. Having these two rating sources available should be a useful way to establish a dialogue about work performance between managers and subordinates when scoring the instrument.

Scoring and Interpretation

The PMI yields a single, overall score representing psychological maturity. The score is the sum of all eleven items. When multiple ratings of an individual’s psychological maturity are obtained (for example, when a person’s peers complete the instrument), the average of all raters’ scores would be used.

Interpretation of the scores depends on the purpose for using the PMI. For example, when a manager uses the PMI as an aid in determining the appropriate behavioral style (according to Situational Leadership® theory) to use with a particular subordinate, the PMI scores can be divided into three segments based on the absolute values of the seven-point scale. In this case, scores of 11 to 32 would represent low maturity, scores of 33 to 55 moderate maturity, and scores of 56 to 77 high maturity. The manager could then consider the use of the Situational Leadership® directives on behavioral style to respond to subordinates at different levels of maturity. Absolute value scores might also be appropriate when evaluating what socialization tactics are necessary for a given subordinate.

Another option for interpreting the PMI scores is to partition the scores based on the actual range obtained from a particular group. For example, consider a case in which ten individuals are evaluated on the PMI and their actual scores range from 24 to 68. The individuals who scored between 24 and 38 would be in the low-maturity category, those between 39 and 53 in the moderate-maturity category, and those between 54 and 68 in the high-maturity category.

Once individuals are categorized or otherwise ranked in terms of their scores, these scores may be discussed with those who have been evaluated. The concept of psychological maturity may be discussed with each individual, and its underlying elements (independence, ability and willingness to take responsibility, and motivation to achieve) may be described. The relationship between psychological maturity and job-related activities may be stressed in terms of the context in which the PMI was used. For example, a manager may use the PMI scores as a means to initiate a dialogue with a subordinate regarding the kind of managerial behavior that would be most effective in
enhancing the subordinate’s performance and satisfaction in the job. This might be especially important if the manager’s and subordinate’s ratings are not similar.

It should be stressed that the PMI is not a totally definitive measure of the complex processes underlying one’s independence, ability and willingness to take responsibility, and motivation to achieve. In this sense, interpretation of the PMI scores is probably most appropriate either as a way of making an initial assessment of a person (in concert with other assessment perspectives) or as a means of facilitating a dialogue about an individual’s job-related activity. Other creative uses for the PMI scores are also possible. One example would be to have a group of work peers complete the instrument for one another, score it, and then use the scores as a basis for discussing their individual and collective needs and how these needs might best be met in order to enhance performance.

REFERENCES


PSYCHOLOGICAL MATURITY INSTRUMENT (PMI)
MULTIPLE-RATER FORM

Warren Blank, John Weitzel, Gary Blau, and Stephen G. Green

Instructions: Respond to each of the following items in terms of the current job responsibilities of each person listed on the matrix scoring sheet. Work through the instrument one item at a time, assessing each person with regard to that item as honestly as you can before proceeding to the next item.

To begin, look at the first name on the matrix scoring sheet. Keeping that person in mind, return to this sheet, read the first item, and evaluate that person with regard to that item. When you have chosen the response you want, write its number in the space provided on the matrix scoring sheet. Follow this procedure for each person listed on the matrix until you have evaluated everyone with regard to the first item. Then proceed to the second item, and so on.

To what extent do you believe that each person:

1. Follows through on job tasks
2. Acts conscientiously on the job
3. Knows what to do without being told
4. Works hard on the job
5. Tries very hard to improve his or her performance on the job
6. Strives to do his or her best on the job
7. Makes job-related decisions on his or her own
8. Does extra on the job
9. Takes care to do the job right
10. Does a thorough job on any task he or she undertakes
11. Sets his or her own job goals

Almost Never     Some-
times     Often     Almost Always
1  2  3  4  5  6  7

Copyright 1988 by Warren Blank, John Weitzel, Gary Blau, and Stephen G. Green. Used with permission. This instrument and the theoretical material that accompanies it may be freely used for educational/training activities. Systematic or large-scale reproduction or distribution may be done only with prior written permission of the authors.
**PSYCHOLOGICAL MATURITY INSTRUMENT (PMI) MATRIX SCORING SHEET**

*Instructions:* Follow the instructions on the multiple-rater form. Then, for each individual being rated, add all the response numbers in that person’s vertical column and write the total in the box provided. That total is the person’s PMI score.

<table>
<thead>
<tr>
<th>Name:</th>
<th>Name:</th>
<th>Name:</th>
<th>Name:</th>
<th>Name:</th>
<th>Name:</th>
<th>Name:</th>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>______</td>
<td>______</td>
<td>______</td>
<td>______</td>
<td>______</td>
<td>______</td>
<td>______</td>
<td>______</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
</tr>
<tr>
<td>4.</td>
</tr>
<tr>
<td>5.</td>
</tr>
<tr>
<td>6.</td>
</tr>
<tr>
<td>7.</td>
</tr>
<tr>
<td>8.</td>
</tr>
<tr>
<td>9.</td>
</tr>
<tr>
<td>10.</td>
</tr>
<tr>
<td>11.</td>
</tr>
</tbody>
</table>

*Total Score*
PSYCHOLOGICAL MATURITY INSTRUMENT (PMI)
SELF-RATING FORM

Warren Blank, John Weitzel, Gary Blau, and Stephen G. Green

Instructions: Respond to each of the following items, in terms of your current job responsibilities, by circling the number that best corresponds to your assessment of your behavior. There are no “right” or “wrong” answers; indicate how you honestly feel about your behavior with regard to each item.

To what extent do you:

<table>
<thead>
<tr>
<th>Item</th>
<th>Almost Never</th>
<th>Sometimes</th>
<th>Often</th>
<th>Almost Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Follow through on job tasks</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>2. Act conscientiously on the job</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>3. Know what to do without being told</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>4. Work hard on the job</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>5. Try very hard to improve your performance on the job</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>6. Strive to do your best on the job</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>7. Make job-related decisions on your own</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>8. Do extra on the job</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>9. Take care to do the job right</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>10. Do a thorough job on any task you undertake</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>11. Set your own job goals</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

Your PMI Score (the total of all responses): __________
SATISFACTION SURVEY: AN AFFECTIVE PERSONAL FEEDBACK INSTRUMENT

Allen J. Schuh

Maslow’s theory of human motivation asserts that certain innate human motives emerge in a sequential pattern according to a hierarchy of five need levels: basic, safety, belongingness, ego-status, and self-actualization. At a given point in time, according to the theory, one level of needs will be more salient than the others. As one need level is satisfied, its prepotency is decreased, and needs at the next higher level come into consciousness and become more salient. For example, when the safety needs are largely satisfied, they decrease in prepotency, and the belonging needs increase in prepotency. According to Maslow, the least satisfied level in the hierarchy has the highest prepotency and is the person’s operating level. After the lower need levels have once been satisfied, they can again motivate behavior but only if they cease to be satisfied for some period of time. Social and environmental conditions could impede the gratification of the lower need levels, or, once they have been gratified, regression to a lower need level could occur.

BACKGROUND AND DEVELOPMENT OF THE INSTRUMENT

During the last twenty years, the semantic differential has become an important tool in psychology for the investigation of attitudes. A semantic differential is a very flexible approach to obtaining measures of attitudes and was developed mainly in relation to a mediational theory of learning. Essentially it is any collection of rating scales anchored by bipolar adjectives. The logic of the semantic differential is that in spoken and written language, characteristics of ideas and objects are communicated largely by means of adjectives and that, consequently, it is reasonable to assume that adjectives can be used to measure various facets of meaning. Most adjectives have logical opposites, as is evidenced in the pairs sweet-sour and tall-short.

The logic of constructing dimensions with multiple items is to obtain a homogeneous group of items that meets requirements of reliability. Several items that can be summed for a particular dimension score permit finer differentiations between persons and tend to average out the idiosyncrasies in each scale. Dimensions are composed of several items that correlate high with one another and low with items in other dimensions.
PURPOSE AND ORGANIZATIONAL IMPLICATIONS

The Satisfaction Survey is an affective personal-feedback instrument consisting of twenty-five bipolar scales in the form of a semantic differential. It can be introduced, taken, and scored in less than twenty minutes. The purpose of the instrument is to give participants fast feedback about where they stand on one of the most useful theories of personality, Maslow’s motivation hierarchy; the scales were constructed to represent the content of Maslow’s five need levels. Discussion can focus on several major topics: self-evaluation in terms of Maslow’s hierarchy, the influence of needs on perceptions, and the implications of motivation to those in supervisory positions.

Maslow’s hierarchy was the first clear statement of motivation that could be used by people managing human organizations. The theory clearly states that management should recognize the importance of higher-order needs to motivate at least some of its participants, suggesting that management shift its attention from traditional lower-order motivators (hours, conditions of the work, and fringe benefits) to higher-order motivators (the work itself: opportunity for responsibility, challenge, autonomy).

Maslow’s theory suggests that motivation is an individual process. Different people want different things, and a number of processes are operating at any given time. Because people will work harder for what they value, organizations can aim at being more flexible in terms of their reward distribution so that it is more likely that individuals will receive valued rewards as a function of what they do. The reward contingencies should be made explicit and administered with extreme attention to fairness. When motivation is properly managed, it will lead to a more productive and satisfied work force.

SUGGESTED DESIGN FLOW

These are the steps suggested in using the Satisfaction Survey.

1. The facilitator briefly introduces the activity, distributes paper and a pencil to each participant, and instructs the participants to find comfortable positions and to remain quiet for about a minute.

2. Participants are directed to write down in a free-association way the first responses that come to their minds for the following topics. They should be told to be honest with themselves in order to gain the most from this activity.

   a. money
   b. work
   c. clothing
   d. a hero
   e. sexual attraction
   f. food
   g. trust
   h. pensions
   i. discussions
   j. independence
   k. physical health
   l. personal growth
   m. physical safety
   n. routine
   o. inherent
   p. authority
   q. well-being
3. Without additional comments, the facilitator distributes copies of the Satisfaction Survey and asks participants to fill them out.

4. Before scoring the questionnaire, the facilitator should present a brief lecturette on Maslow’s motivation hierarchy and the influence of needs on perception.

5. Participants are directed how to score their responses on the Satisfaction Survey and how to locate themselves on the Maslow motivation hierarchy.

6. Participants should then examine their responses to the free-association items and evaluate the extent to which their operating levels have influenced their perceptions of these concepts.

7. The facilitator then leads a discussion of the implications that participants attach to their placements on the Satisfaction Survey Profile Sheet and what effect their operating levels have on their interpersonal behavior patterns and impressions of their environment.

8. Each participant writes at least two implications of the experience for “back-home” application. These statements are shared with the group.

If the group consists of nonmated participants, the facilitator should focus on the possibility of conflict between two separated need levels (possibly I and IV) and what effect this conflict might have on the participants’ interpersonal behaviors. Participants who are supervisors, parents, or teachers can be asked to guess what assumptions they are apt to make about the motivations of their work groups, children, or students and, thus, what kinds of climates they are likely to create for their employees, children, or students.

**BACKGROUND READING**


SATISFACTION SURVEY

Allen J. Schuh

Instructions: On the following list of twenty-five bipolar scales, you are to rate two different concepts: “Myself Now” (“M”) and “The Way I Would Most Want to Be” (“I” for Ideal Self). Place an “M” on each scale in the space that best describes your feeling about that item as it pertains to you now. Then go back through the list and place an “I” on each scale in the space that best describes the way you would most want to be in terms of that item. It is possible for your “M” and “I” ratings to be the same.

Example:


In this case, the placement of the “Myself Now” concept on the scale of “aggressive-defensive” indicates that the individual sees himself or herself as “somewhat” aggressive now, but that he or she would like to be “extremely” aggressive.

Scales

<table>
<thead>
<tr>
<th>Scale</th>
<th>M</th>
<th>I</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>hungry</td>
<td></td>
<td></td>
<td>1.</td>
</tr>
<tr>
<td>sexually satisfied</td>
<td></td>
<td></td>
<td>2.</td>
</tr>
<tr>
<td>sleepy</td>
<td></td>
<td></td>
<td>3.</td>
</tr>
<tr>
<td>impotent</td>
<td></td>
<td></td>
<td>4.</td>
</tr>
<tr>
<td>healthy</td>
<td></td>
<td></td>
<td>5.</td>
</tr>
<tr>
<td>secure</td>
<td></td>
<td></td>
<td>6.</td>
</tr>
<tr>
<td>striving</td>
<td></td>
<td></td>
<td>7.</td>
</tr>
<tr>
<td>protected</td>
<td></td>
<td></td>
<td>8.</td>
</tr>
<tr>
<td>in danger</td>
<td></td>
<td></td>
<td>9.</td>
</tr>
<tr>
<td>unopposed</td>
<td></td>
<td></td>
<td>10.</td>
</tr>
<tr>
<td>not allied</td>
<td></td>
<td></td>
<td>11.</td>
</tr>
<tr>
<td>with group identification</td>
<td></td>
<td></td>
<td>12.</td>
</tr>
<tr>
<td>rejecting of group goals</td>
<td></td>
<td></td>
<td>13.</td>
</tr>
<tr>
<td>accepted socially</td>
<td></td>
<td></td>
<td>14.</td>
</tr>
<tr>
<td>displaced</td>
<td></td>
<td></td>
<td>15.</td>
</tr>
<tr>
<td>self-reliant</td>
<td></td>
<td></td>
<td>16.</td>
</tr>
</tbody>
</table>

Points

1. ______
2. ______
3. ______
4. ______
5. ______
6. ______
7. ______
8. ______
9. ______
10. ______
11. ______
12. ______
13. ______
14. ______
15. ______
16. ______
<table>
<thead>
<tr>
<th>Scales</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>self-respecting</td>
<td>self-disrespecting  17. ______</td>
</tr>
<tr>
<td>self-contemptuous</td>
<td>self-esteeming  18. ______</td>
</tr>
<tr>
<td>doubtful</td>
<td>confident   19. ______</td>
</tr>
<tr>
<td>independent</td>
<td>dependent   20. ______</td>
</tr>
<tr>
<td>feeling unfulfilled</td>
<td>feeling fulfilled  21. ______</td>
</tr>
<tr>
<td>repetitive</td>
<td>creative    22. ______</td>
</tr>
<tr>
<td>growing</td>
<td>shrinking   23. ______</td>
</tr>
<tr>
<td>unadapted</td>
<td>adjusted    24. ______</td>
</tr>
<tr>
<td>regressing</td>
<td>expanding   25. ______</td>
</tr>
</tbody>
</table>
SATISFACTION SURVEY SCORING AND INTERPRETATION SHEET

Scoring Instructions: Use the following steps to determine your score on the Satisfaction Survey.

1. Count the absolute number of points separating your “I” and “M” marks on each bipolar scale. The difference score is zero if “I” and “M” fall on the same scale point. A maximum score of six is possible on each scale.

2. Write the number of points separating “I” and “M” in the space provided at the right of each bipolar scale.

3. Add the number of points for the first five items and write that score in the space indicated on the Satisfaction Survey Profile Sheet. This discrepancy score is your dissatisfaction on Maslow’s need level I, Basic. Plot this score by placing an “X” on the Need Strength Profile at the correct point for this need. Use the same procedure for each successive group of five items. Thus you will have an “X” on the profile sheet for each of five dimensions representing the five need levels: I (Basic), II (Safety), III (Belonging), IV (Ego-Status), and V (Actualization). Then connect your five “X”s with straight lines to obtain a graphic representation of your need strengths.

Interpretation

Your greatest unsatisfied need level is identified by your highest score on the Satisfaction Survey Profile Sheet: your “operating level,” then, is the level at which there is the greatest discrepancy between where you are now and where you want to be.

The operating level will dominate your perception. It is most likely that you saw the words in the association exercise through the lens of your operating level. The word “money,” for example, may be seen by one person as “paying the rent” but as “shows my status” to another. Pay, then, is not a higher or lower motivator except as it is perceived by the person in relationship to it. “A hero” tends to be seen as a “fool” to someone operating at the safety need level but as “someone to be like” to a person operating at the egostatus need level. “Independence” is demanded by someone at the egostatus level and feared by someone at the belonging level. We perceive the world and give it meaning in terms of our own needs.
SATISFACTION SURVEY PROFILE SHEET

V. Actualization:
- inherent well-being,
- self-fulfillment, personal growth
- and development, the opportunity
to fulfill one's basic potential — to
become more like one's natural self

IV. Ego-Status: esteem needs for
- accomplishment, participation, prestige, self-
- esteem, independent thought and action, privileges,
- authority, recognition, professional group membership

III. Belonging: social needs for affection and
caring relationships: trust, feedback, friendships,
discussions, being informed, helping other people

II. Safety: healthcare, fringe benefits, routine, stability, financial reward, safety, security

I. Basic: physiological needs for food, sex, clothing, living quarters, and physical fitness

Need Strength Profile

<table>
<thead>
<tr>
<th>Items</th>
<th>Score:</th>
<th>0</th>
<th>2</th>
<th>6</th>
<th>10</th>
<th>14</th>
<th>18</th>
<th>22</th>
<th>26</th>
<th>30</th>
</tr>
</thead>
<tbody>
<tr>
<td>21-25</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16-20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6-10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SELF-DISCLOSURE QUESTIONNAIRE

Sidney M. Jourard

Disclosing oneself to others is one of the most important concepts in human relations training. Through the process of feedback and self-revelation, people can make themselves known to others and learn how others see them.

Self-disclosure may be either verbal or nonverbal. People reveal themselves not only through words, but also through actions, reactions, mannerisms, and personal style.

One human relations goal is to encourage individuals to move toward self-disclosure, allowing new information about themselves to become apparent to others. To do so, people must be able to accept and trust both themselves and others.

Different people have different degrees of readiness to confide in others. It has been suggested (Jourard, 1958) that accurately portraying oneself to others is an identifying criterion of a healthy personality. A neurotic individual, on the other hand, may be incapable of knowing his or her “real” self and of revealing that self to others.

The “Self-Disclosure Questionnaire” raises and deals with certain questions: For example, do subjects disclose themselves differently to different “target” persons, such as mother, father, or friend? Do subjects tend to disclose certain areas of information about themselves more fully than other areas? Do sex differences have any bearing on self-disclosure?

Preliminary findings from the use of this questionnaire show that self-disclosure is measurable and that this method of assessing it has some validity. Many more questions about self-disclosure are open for exploration, based on relevant factors—groups, target persons, aspects of self, individual differences.

This questionnaire can be useful as a self-inventory in personal growth laboratories or as an outcome measure in research on human relations training.

The sixty items of the questionnaire have been classified into six groups of ten related items each. Each group concerns a general category of information about the self (aspects).

REFERENCES


SELF-DISCLOSURE QUESTIONNAIRE

Sidney M. Jourard

Instructions: The Answer Sheet that you have been given has columns with the headings “Mother,” “Father,” “Male Friend,” “Female Friend,” and “Spouse.” You are to read each item on the questionnaire and then indicate on the Answer Sheet the extent to which you have talked about that item to each person; that is, the extent to which you have made yourself known to that person. Use the rating scale on the Answer Sheet to describe the extent that you have talked about each item.

Attitudes and Opinions

1. What I think and feel about religion; my religious views.
2. My opinions and feelings about religious groups other than my own, e.g., Protestants, Catholics, Jews, atheists.
3. My views on socialism.
4. My views on the present government—the president, government, policies, etc.
5. My views on racial equality.
6. My views on drinking.
7. My views on sexual morality—how I feel that I and others ought to behave in sexual matters.
8. Things that I regard as desirable for a woman to be—what I look for in a woman.
9. Things that I regard as desirable for a man to be—what I look for in a man.
10. My feeling about how parents ought to deal with children.

Tastes and Interests

1. My favorite foods, the ways I like food prepared, and my food dislikes.
2. My favorite beverages and the ones I don’t like.
5. The types of movies that I like to see; the TV shows that are my favorites.
6. My tastes in clothing.
7. The style of house and the kinds of furnishings that I prefer.

---

1 This questionnaire is taken from The Transparent Self by Sidney Jourard. Copyright© 1971. Reprinted by permission of Van Nostrand Reinhold, N.Y., N.Y.
8. The kind of party or social gathering that I prefer and the kind that would bore me or that I wouldn’t enjoy.

9. My favorite ways of spending spare time, e.g., gardening, reading, cards, sports events, parties, dancing, etc.

10. What I would appreciate most as a present.

Work (or Studies)

1. What I find to be the worst pressures and strains in my work.

2. What I find to be the most boring and unenjoyable aspects of my work.

3. What I enjoy most and get the most satisfaction from in my present work.

4. What I feel are my shortcomings and handicaps that prevent me from working as I’d like to or that prevent me from getting further ahead in my work.

5. What I feel are my special strong points and qualifications for my work.

6. How I feel that my work is appreciated by others (e.g., boss, coworkers, teacher, husband, etc.).

7. My ambitions and goals in my work.

8. My feelings about the salary or rewards that I get for my work.

9. How I feel about the choice of career that I have made—whether or not I’m satisfied with it.

10. How I really feel about the people that I work for, or work with.

Money

1. How much money I make at my work or get as an allowance.

2. Whether or not I owe money; if so, how much.

3. Whom I owe money to at present or whom I have borrowed from in the past.

4. Whether or not I have a savings account and the amount.

5. Whether or not others owe me money; the amount, and who owes it to me.

6. Whether or not I gamble; if so, the way I gamble, and the extent of it.

7. All of my present sources of income—wages, fees, allowance, dividends, etc.

8. My total financial worth, including property, savings, bonds, insurance, etc.

9. My most pressing need for money right now, e.g., outstanding bills, some major purchase that is desired or needed.

10. How I budget my money—the proportion that goes to necessities, luxuries, etc.
**Personality**

1. The aspects of my personality that I dislike, worry about, that I regard as a handicap to me.
2. What feelings, if any, I have trouble expressing or controlling.
3. The facts of my present sex life—including knowledge of how I get sexual gratification; any problems that I might have; with whom I have relations, if anybody.
4. Whether or not I feel that I am attractive to the opposite sex; my problems, if any, about getting favorable attention from the opposite sex.
5. Things in the past or present that I feel ashamed and guilty about.
6. The kinds of things that make me just furious.
7. What it takes to get me feeling depressed.
8. What it takes to get me real worried, anxious, and afraid.
9. What it takes to hurt my feelings deeply.
10. The kinds of things that make me especially proud of myself, elated, full of self-esteem or self-respect.

**Body**

1. My feelings about the appearance of my face—things I don’t like and things that I might like about my face and head—nose, eyes, hair, teeth, etc.
2. How I wish I looked; my ideals for overall appearance.
3. My feelings about different parts of my body—legs, hips, waist, weight, chest or bust, etc.
4. Any problems and worries that I had with my appearance in the past.
5. Whether or not I now have any health problems, e.g., trouble with sleep, digestion, heart condition, allergies, headaches, etc.
6. Whether or not I have any long-range worries or concerns about my health, e.g., cancer, ulcers, heart trouble.
8. Whether or not I now make special efforts to keep fit, healthy, and attractive, e.g., calisthenics, diet.
9. My present physical measurements, e.g., height, weight, waist, etc.
10. My feelings about my adequacy in sexual behavior—whether or not I feel able to perform adequately in sex relationships.
SELF-DISCLOSURE QUESTIONNAIRE
ANSWER SHEET

Use the following rating scale for each item on the “Self-Disclosure Questionnaire”:

0: Have told the other person nothing about this aspect of me.
1: Have talked in general terms about this item. The other person has only a general idea about this aspect of me.
2: Have talked in full and complete detail about this item to the other person. He or she knows me fully in this respect and could describe me accurately.
X: Have lied or misrepresented myself to the other person so that he or she has a false picture of me.

<table>
<thead>
<tr>
<th>Self-Disclosure Aspect</th>
<th>Target Person</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mother</td>
</tr>
<tr>
<td>Attitudes and Opinions</td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
<tr>
<td>Tastes and Interests</td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
</tbody>
</table>
### Self-Disclosure Aspect

#### Work (or Studies)

<table>
<thead>
<tr>
<th></th>
<th>Target Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
</tbody>
</table>

#### Money

<table>
<thead>
<tr>
<th></th>
<th>Target Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
<tr>
<td>Self-Disclosure Aspect</td>
<td>Mother</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Personality</td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
<tr>
<td>Body</td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
</tbody>
</table>
SELF-DISCLOSURE QUESTIONNAIRE SCORING SHEET

*Instructions*: On the Answer Sheet compute the sums for each target person in each self-disclosure aspect and copy each sum on the Scoring Sheet.

<table>
<thead>
<tr>
<th>Target Person</th>
<th>Aspect</th>
<th>Mother</th>
<th>Father</th>
<th>Male Friend</th>
<th>Female Friend</th>
<th>Spouse</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Attitudes and opinions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Tastes and Interests</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Work (or Studies)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Money</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Personality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Body</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Plot these scores on the accompanying Profile Sheet.
SELF-DISCLOSURE QUESTIONNAIRE PROFILE SHEET

Instructions: Draw profiles for each of your “target” persons on the chart below. (You may wish to use different colored pencils.) Locate your five scores for Mother, for example, and connect these with straight lines. Do the same for each of the other persons.

On the scale representing your total self-disclosure scores, write the names of the target persons at their appropriate levels.

Interpretation Suggestions: Studying the chart below, (1) look for similarity/dissimilarity of profiles between target persons and (2) look for high and low self-disclosure aspects across target persons.
SELF-RELIANCE INVENTORY

James Campbell Quick, Debra L. Nelson, and Jonathan D. Quick

HEALTHY LIFE ADJUSTMENT

Healthy life adjustment is linked primarily to the presence of two factors, self-reliance and a secure support network. People who are self-reliant and yet are able to depend on others when appropriate are better equipped to manage the challenges they meet than are those without self-reliance and support.

The Role of Self-Reliance

According to Bowlby (1973, 1982, 1988), bonding with others is an instinctual behavior that all humans exhibit. As children, our “primary attachment figures”—those with whom we bond most closely—are usually our parents; when we need them, we want and expect them to be readily available. If these primary attachment figures are not present to meet our physical, emotional, and psychological needs, we experience separation anxiety, which incorporates feelings of isolation, loneliness, and distress. If separation anxiety is experienced frequently and intensely during childhood, it becomes an enduring feature of the personality, interfering with an individual’s normal development and the formation of successful relationships; it can result in an absence of self-reliance and feelings of anxiety, anger, depression, and a variety of health disorders. An absence of self-reliance may be expressed as either overdependence or counterdependence. The overdependent person strives for too much togetherness in relationships, clinging to others out of fear of being incomplete. The counterdependent person strives for too much separateness, avoiding relationships with others and denying the necessity or importance of such relationships.

On the other hand, the person who has not experienced or has overcome the effects of repeated separation anxiety has a strong chance of becoming self-reliant. The attribute of self-reliance means accepting responsibility for one’s own well-being and, at the same time, knowing that someone will be available and willing to help in times of need. Self-reliant individuals have resolved the conflict between their separateness in the world and their need for union with others; they can work comfortably and naturally either with others or alone, depending on which is more appropriate to the circumstances at hand. They are able to discern when their limitations have been reached in terms of time, energy, knowledge, or abilities; by turning to others in these circumstances, they overcome their own limitations, thus enhancing their effectiveness and well-being.
The Role of Support Networks

The need for attachment figures carries over to the adult years and can be met by developing a secure support base, often called a “support network.” Self-reliant people who build strong support networks and use them appropriately do not have problems with either overdependence or counterdependence. Bowlby (1988) likens an individual’s need for a support network to a military expeditionary force’s need for a secure base of operations from which logistical and other operational support may be obtained. Without a secure base, the expeditionary force is very much at risk. In a similar manner, adults need secure relationships and attachments that provide them with emotional and psychological bases from which to operate.

The relationships in a person’s support network include those with family members, friends, coworkers, professional colleagues, fellow members of spiritual or religious organizations, and so on. In their studies, the authors have found that successful, healthy executives have particularly well-developed support networks characterized by relationships in which they both give and receive in a variety of ways. The individual relationships in such a support network are characterized by confidence, trust, and mutual respect. These relationships are not one-sided; instead, each person’s role in any given relationship involves both providing and receiving support. Obviously, the degree of balance between providing and receiving varies from relationship to relationship; however, the support network as a whole presents a good provider-receiver balance.

A support relationship may provide any or all of the following five types of support. An individual may be either the recipient (R) or provider (P) of any of these types:

1. **Protective.**
   - R: The individual is defended against problems or threats in the environment.
   - P: The individual defends the other person against problems or threats in the environment.

2. **Informational.**
   - R: The individual is given the information necessary to perform a particular role.
   - P: The individual gives necessary role information to another person.

3. **Evaluative.**
   - R: The individual receives positive and/or negative feedback\(^1\) about behavior and performance.
   - P: The individual gives positive and/or negative feedback about the behavior or performance of the other person.

4. **Modeling.**
   - R: The individual emulates another whose behavior or performance represents a standard for him or her.

---

\(^1\) Bushardt and Fowler (1989, p. 13) define positive and negative feedback in this way: “Positive feedback is information that reinforces desired behaviors and encourages repetition of those behaviors by communicating that they had the intended effects. Negative feedback is information that discourages behaviors by communicating that they did not have the intended effects.”
P: The individual’s behavior or performance serves as a standard for the other person.

5. Emotional.

R: The individual receives care and nurturance from the other person.

P: The individual gives care and nurturance to the other person.

THE INSTRUMENT

Format and Administration of the Instrument

The Self-Reliance Inventory consists of twenty statements. The respondent completes the instrument by evaluating each statement according to a six-point scale, ranging from 0 (Strongly Disagree) to 6 (Strongly Agree). Then the respondent records responses on the scoring sheet, which results in two scores, one in the overdependence dimension and the other in the counterdependence dimension. These scores are then plotted on a horseshoe-shaped structure that illustrates degrees of overdependence and counterdependence in terms of proximity to or distance from self-reliance.

After plotting scores on the scoring sheet, the respondent refers to the two versions of the support-network analysis, the recipient version and the provider version. The respondent completes both versions, listing all people from whom he or she receives support on the recipient version and all people to whom he or she gives support on the provider version as well as the frequency of interaction with those listed. Subsequently, the respondent completes the support-network evaluation sheet and the support-network action plan. These two forms help the respondent to plan efforts to enhance self-reliance as well as the strength of the support network.

Uses of the Instrument

Earlier versions of the Self-Reliance Inventory have been used with graduate students in psychology, business, nursing, and other disciplines; these versions were used as part of a program focusing on the principles and practices of preventive stress management. These earlier versions also have been used with executives and managers as a vehicle for increasing self-awareness in the field of stress. In addition, the inventory has been used in combination with a range of other self-report instruments in studying such elements as Type-A behavior patterns (Friedman & Rosenman, 1974) and locus of control in connection with profiling individual stresses and strains. Consequently, one recommended use of the inventory is in connection with a stress-management training program. Much of the literature on stress management emphasizes the importance of developing and making appropriate use of a support network, and the issues of overdependence and counterdependence are linked with the experience of high levels of stress.
Either in an organizational setting or in the context of personal-growth training, the instrument can be used to help individuals diagnose and then plan to improve their levels of self-reliance. Individuals who have mastered the art of relying on themselves when appropriate and turning to others as the need arises are invaluable assets to an organization. In fact, current organizational trends—such as empowerment, management practices that emphasize coaching rather than directing subordinates, and the dependence on ongoing work teams to solve their own problems—make the need for self-reliant employees more critical now than it has been in the past. The human resource development (HRD) professional also can advocate that managers incorporate self-reliance into the performance-appraisal system and reward self-reliant behavior when they observe it. Managers also can be encouraged to identify and reward the appropriate use of support networks (through mentoring relationships, for example).

REFERENCES AND BIBLIOGRAPHY


### SELF-RELIANCE INVENTORY 2

James Campbell Quick, Debra L. Nelson, and Jonathan D. Quick

**Instructions:** The twenty statements below relate to how you form attachments with people at home, at work, and in other areas of your life. There are no right or wrong answers. Circle the number that most accurately describes your response, using the following scale:

<table>
<thead>
<tr>
<th>Number</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Somewhat Disagree</th>
<th>Somewhat Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

1. I make a strong effort to work alone and in a solitary fashion.  
2. It is difficult for me to delegate work to others.  
3. I need to have colleagues or subordinates close in order to feel secure about my work.  
4. People will always be there when I need them.  
5. I regularly and easily spend time with other people during the work day.  
6. Developing close relationships at work will backfire on you.  
7. I become very concerned when I have conflict with family members at home.  
8. I have difficulty leaving an old job and friends for a new job.  
9. I trust at least two other people to have my best interests at heart.  
10. I think I am the only one who can do a job right.

---

<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Somewhat Disagree</th>
<th>Somewhat Agree</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>I am comfortable working alone for extended periods of time.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>12</td>
<td>I get very upset and disturbed if I have conflicts in relationship(s) at work.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>13</td>
<td>I avoid depending on other people because I feel crowded by close relationships.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>14</td>
<td>I am frequently suspicious of other people’s motives and intentions.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>15</td>
<td>On some tasks I can work effectively without other people.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>16</td>
<td>I prefer very frequent feedback from my boss to know I am performing well.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>17</td>
<td>Asking for help makes me feel needy, and I do not like that.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>18</td>
<td>I have a healthy, happy home life.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>19</td>
<td>I always consult others when I make decisions.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>20</td>
<td>It is difficult for me to leave home or work to go to the other.</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>
SELF-RELIANCE INVENTORY SCORING SHEET

**SCORING INSTRUCTIONS**

1. Write the number that you circled for each of the following statements in the appropriate blank. Then add the numbers in each vertical column and record the subtotals in the blanks provided for Subtotal #1CD and Subtotal #1OD.

<table>
<thead>
<tr>
<th>CD Column</th>
<th>OD Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement 1</td>
<td>Statement 3</td>
</tr>
<tr>
<td>Statement 2</td>
<td>Statement 7</td>
</tr>
<tr>
<td>Statement 6</td>
<td>Statement 12</td>
</tr>
<tr>
<td>Statement 10</td>
<td>Statement 16</td>
</tr>
<tr>
<td>Statement 13</td>
<td>Statement 19</td>
</tr>
<tr>
<td>Statement 14</td>
<td>Statement 20</td>
</tr>
<tr>
<td>Statement 17</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal #1CD</strong></td>
<td><strong>Subtotal #1OD</strong></td>
</tr>
</tbody>
</table>

2. Write the number that you circled for each of the following statements in the appropriate blank. Then add the numbers in each vertical column and record the sums in the blanks provided for Sum CD and Sum OD. After you have recorded the sums, complete the equations that follow by subtracting as indicated.

<table>
<thead>
<tr>
<th>CD Column 2</th>
<th>OD Column 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement 5</td>
<td>Statement 4</td>
</tr>
<tr>
<td>Statement 9</td>
<td>Statement 8</td>
</tr>
<tr>
<td>Statement 18</td>
<td>Statement 11</td>
</tr>
<tr>
<td>Statement 15</td>
<td></td>
</tr>
<tr>
<td><strong>SUM CD</strong></td>
<td><strong>SUM CD</strong></td>
</tr>
</tbody>
</table>

\[
\text{Subtotal #2CD} = (15 - _____) = _____ \\
\text{Subtotal #2OD} = (20 - _____) = _____
\]

3. Write the subtotals in the appropriate blanks below and add them vertically as shown. The resulting totals are your CD and OD scores.

<table>
<thead>
<tr>
<th>Subtotal #1 CD</th>
<th>Subtotal #1 OD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal #2 CD</td>
<td>Subtotal #2 OD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CD Total</th>
<th>OD Total</th>
</tr>
</thead>
</table>
4. Plot your scores on the following horseshoe-shaped structure. Your CD (counterdependence) score is plotted with an X on the left side of the horseshoe, and your OD (overdependence) score is plotted with an X on the right side of the horseshoe. Your plotted scores indicate your degrees of counterdependence and overdependence in terms of proximity to or distance from self-reliance.

**THE NEXT STEPS**

After you have plotted your scores, complete both the recipient version and the provider version of the support-network analysis form. Then complete the support-network evaluation sheet and the support-network action plan; these two forms will help you plan efforts to enhance your self-reliance as well as the strength of your support network.
SELF-RELIANCE INVENTORY SUPPORT-NETWORK ANALYSIS FORM  
(Recipient Version)

*Instructions:* A well-developed support network includes many *sources* of support (people to whom you can turn). This analysis form is provided to help you evaluate your sources of support. Fill in the blanks with the names of people from whom you receive support (people who provide you with support). In the parentheses following each blank, write a number to indicate how many times per week (or per month, if you prefer) you interact with that person.

<table>
<thead>
<tr>
<th>Work-Related Network</th>
<th>Nonwork-Related Network</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal Organization Relationships</strong></td>
<td><strong>Family</strong></td>
</tr>
<tr>
<td>Boss</td>
<td>Members</td>
</tr>
<tr>
<td>Coworkers</td>
<td></td>
</tr>
<tr>
<td>Subordinates</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
</tr>
<tr>
<td><strong>Informal Organization Relationships</strong></td>
<td><strong>Friends</strong></td>
</tr>
<tr>
<td>Social Contacts at Work</td>
<td></td>
</tr>
<tr>
<td>Colleagues (e.g., from professional associations)</td>
<td>Fellow Members of Religious/Social Groups</td>
</tr>
<tr>
<td>Others</td>
<td></td>
</tr>
</tbody>
</table>

**SELF-RELIANCE INVENTORY SUPPORT-NETWORK ANALYSIS FORM**  
(Provider Version)

*Instructions:* A well-developed support network includes relationships in which you provide support to others. This analysis form is provided to help you evaluate these relationships and your role as a provider of support. Fill in the blanks with the names of people to whom you give support. In the parentheses following each blank, write a number to indicate how many times per week (or per month, if you prefer) you interact with that person.

<table>
<thead>
<tr>
<th>Work-Related Network</th>
<th>Nonwork-Related Network</th>
</tr>
</thead>
</table>
| **Formal Organization Relationships** | | Family  
Members  
| | |
| Boss | ________ ( ) | |
| Coworkers | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
| Subordinates | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
| Others | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
| **Informal Organization Relationships** | | Fellow Members of Religious/Social Groups  
Colleagues (e.g., from professional associations) | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
| Social Contacts at Work | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
| Others | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
| | ________ ( ) | |
SELF-RELIANCE INVENTORY
SUPPORT-NETWORK EVALUATION SHEET

Instructions: Completing the recipient and provider versions of the support-network analysis form should help you understand the attachments you have with other people. After you have completed both of those forms, jot down answers to the following questions.

1. Were there blanks for which you could not supply a name? If so, where were they? (What kinds of relationships did they represent?)

2. Which network analysis was more complete, the recipient version or the provider version? What does that say to you?

3. How would you evaluate the balance between your work and nonwork networks as both a recipient and provider of support?

4. What particular types of support do you need that are unavailable in your network?

5. What particular types of support would you like to provide to others but do not presently provide?
SELF-RELIANCE INVENTORY ACTION PLAN

*Instructions:* After completing the inventory, the scoring sheet, both versions of the support-network analysis form, and the support-network evaluation sheet, your action focus should be on your support network. Because self-reliance is an interpersonal issue, it must be worked on in connection with others. Complete the following items so that you can start on an action plan to build your self-reliance and your support network. After you have completed these items, make plans to review your progress at intervals over the next few months.

1. I want to emphasize and develop more fully the following relationships in my support network:

2. I want to de-emphasize or eliminate the following relationships in my support network:

3. I want to identify and develop relationships in the following areas of my life:

4. I will let the most important people in my life know how I feel about their relationships with me by doing the following:
VALUE-SYSTEM INSTRUMENT

Michele Stimac

VALUES AND DIVERSITY

Shifting demographics have increased concern about how to manage and value diversity in organizations and in society in general. We are compelled to examine human resource policies and procedures, educational methodologies and practices, equal access, affirmative action, and cultural sensitivity (Morrison, 1992). In the 1970s, in the aftermath of the Watergate scandal, value clarification (Harmin, et al., 1973; Kirschenbaum, 1977) became an important activity, and now concern for values diversity as a spinoff of the larger diversity issue has returned to challenge organizations. As Jamieson and O’Mara (1991) point out:

Today’s workforce is characterized by a mix of values. Some employees will primarily value their home and family life, others their career. Some will value loyalty to their company, others loyalty to their profession, and still others loyalty to themselves. Sometimes men and women will share identical values; at other times their values will differ. Often, what people may have been lacking, such as money, respect, or control, will be most highly valued. Values may change with significant life experiences or simply with age. (p. 27)

It is important for the workplace, for institutions of higher education, and for training organizations to develop ways for individuals and groups to ask significant questions about their value systems in order to determine how diverse groups and individuals can live, work, govern, and develop social structures together.

Bennis (1989, p. 126) advances four tests for those interested in becoming leaders; the third is: “...knowing what your values and priorities are, knowing what the values and priorities of your organization are, and measuring the difference between the two.” In his book The 7 Habits of Highly Effective People, Covey (1990) suggests that:

Each of us has many, many maps in our head, which can be divided into two main categories: maps of the way things are, or realities, and maps of the way things should be, or values. We seldom question their accuracy; we’re usually even unaware that we have them. (p. 24)

Gardner (1990, p. 113) offers the opinion that “If leaders cannot find in their constituencies any base of shared values, principled leadership becomes nearly impossible.”

In examining the lives of seventy-seven women who span three generations and who include a group of influential individuals in the women’s movement, Astin and Leland (1991) discovered that “clarity of values” was especially important in establishing the women as leaders. Gilligan (1982), in her research on the differences between the ways in which women and men think and solve problems, has shown that...
women often display values different from those of men, but the styles of leadership that emanate from their values are not less appropriate than those of men.

Frankl (1959), speaking from his own experience in a holocaust camp, states emphatically that human beings are able to live and even die for the sake of their ideals and values.

Examining one’s own values, in conjunction with the diverse individuals and groups that surround us, is essential. Teamwork, cooperation, and creativity are more likely to occur when the members of organizations understand their own and their coworkers’ values.

**THE VALUE-SYSTEM INSTRUMENT**

The Value-System Instrument has a twofold purpose: to stimulate personal reflection about values, needs, wants, and beliefs and to generate discussion in groups about the conscious or unconscious ways in which these influence behavior. Although values, needs, wants, and beliefs are distinct, they are existentially inseparable. It is for this reason that they are integrated into a composite system in the instrument.

The instrument is not normed; it has no scoring method. Its purpose is not to promote certain values and denounce others. Rather, its primary purpose is to generate reflection and discussion about values represented by the diversity of individuals in organizations. It is up to individuals and the organizations in which they function to determine the effects that their values have on either themselves or their organizational systems and to determine what individual or organizational changes need to be made to develop individual and collective cooperation, vision, mission, and goals.

The instrument also can be used in institutions of higher learning in which individuals are being trained as educational leaders or in counseling settings in which individuals are led to explore their values for the purpose of personal growth.

The instrument can be administered in its entirety or in part. Participants can be asked to complete the entire instrument, following the directions in both Step I and Step II, or they can be asked to focus only on certain segments selected by a facilitator who has specific instructional purposes in mind. Those who wish to examine values that appear to impact the workplace, for instance, may prefer to focus on segments such as race/ethnicity, gender, education, age/disability, career/profession/job, and personal fulfillment/wellness. Personal growth facilitators may wish to focus on segments such as marriage/single life, sex, family, etc. Educators may wish to direct their peers’ attention to attitudes toward those whom they serve as well as toward those with whom they work.

**Sample Use of the Value-System Instrument**

There is always risk in describing ways to use an instrument. Readers can lock onto these descriptions as rigidly representing the only appropriate ways to use it. It is presumptuous to assume that any description of group process will fit any situation
perfectly. However, this section will offer a sample of how to use the instrument, trusting that it will be perceived as only a hypothetical sample to be adapted appropriately to the situations in which users find themselves.

Three brief scenarios are presented to identify examples of settings in which the instrument might be used. The scenarios are followed by an outline of group process that can be used in working with the instrument. The process is designed with Scenario One in mind. Those who find the other two scenarios closer to their actual situations are encouraged to adapt the process described or to design their own.

**Scenario One**

The setting is a workplace in which leaders are concerned about maximizing the organization’s human resources through effective teamwork. These leaders are pleased that they have achieved some measure of racial, ethnic, and gender diversity in their organization. Now they realize that it is important that the employees in each work unit work together cooperatively as a group and, at the same time, feel free to be individually creative. They decide that providing employees with an opportunity to focus on what they value as individuals and what this means in terms of organizational values, mission, and goals is important. They engage facilitators of group work to conduct this exploration, knowing that issues of diversity are sensitive and that dialogue about them needs to be led by individuals with the proper expertise.

**Scenario Two**

The setting is a college/university class on leadership attended by adult students who seek an advanced degree in management/leadership. The professor decides that it is important for future leaders to understand their value systems because their values will influence the visions they bring to the workplace, the ways in which they facilitate corporate vision, how they define organizational mission, and how they behave with colleagues. The professor’s objective is to get the students who come from various work settings to examine their own values and to discuss how they believe these values influence their behaviors in their organizations.

**Scenario Three**

The setting is a group counseling one. The counselor has determined that understanding one’s values is necessary for personal growth and development. The individuals in the group represent a modest cross-section of society in background, age, gender, and ethnicity. They are more homogenous than heterogeneous. The counselor decides to use a value instrument with the group.
Description of Group Process Related to Scenario One

Time Frame

A block of three hours is scheduled for work on values in each organizational unit (fifteen to twenty-five individuals).

Climate Setting and Clarification of Terms

(Twenty to thirty minutes.) The facilitators establish an open and accepting climate to reduce tension and raise trust. They make sure that everyone is introduced and physically comfortable. They explain at the beginning of the session what values are and the importance they play in personal and professional lives.

According to Rokeach (1979, p. 5), a value system “is an enduring organization of beliefs concerning preferable modes of conduct or end-states of existence along a continuum of relative importance.” In other words, values are the “ends” and “means” that we prefer and choose. Rokeach’s definition of a value system and Raths, Harmin, and Simon’s (1966) criteria for value establishment can be presented to participants for consideration as they complete the instrument. These authors believe that for something to be classified as a value, it has to satisfy several criteria. Persons who “value something” must do the following:

1. Choose freely, choose from alternatives, and choose after thoughtful consideration of consequences;
2. Cherish and affirm what they consider a value; and
3. Repeat actions based on what they value.

Raths et al. believe that if we cannot openly declare a “value,” that which we believe to be a value is probably not really a value at all, but only a “value indicator.” Value indicators may be easier to change.

Although not everyone may agree that these are criteria for values, they serve as an underpinning for Step II of the Value-System Instrument.

Administration of the Instrument

(Twenty to thirty minutes.) When climate setting is complete and terms are understood, the participants are given twenty to thirty minutes to complete the Value-System Instrument. They are encouraged to work rapidly through Step I. They may take more time with Step II, but their first reactions to the items in Step I are probably the most honest.

In order to allow participants more time to complete the instrument, the facilitators may distribute it prior to the group session and suggest that the participants take it home, where they can spend as much time as they wish completing it. Regardless of where or when the participants complete the instrument, they should be encouraged to respond
quickly and spontaneously to the items and then to reflect later on their responses as preparation for the group discussion.

Small-Group Discussion

(Sixty to ninety minutes.) In the group setting, subgroups of four or five members each should be created. If the subgroups are too large, members are less inclined to share their values, needs, wants, and beliefs. Membership in the subgroups can be assigned randomly or can be self-selected; subgroups can be created with some purposeful diversity mix in mind.

It is important that participants be advised to share only as much as they wish; the purpose of the instrument is to provoke thinking and honest discussion of the influences in participants’ lives but not to do so in a threatening way. On the other hand, facilitators should stress the importance of sharing thoughts. Human beings learn in several ways: by reading, writing, listening, reflecting, and also by talking. When we can articulate what we think, we often discover for the first time what we really believe.

It is obvious from the comprehensiveness of the values instrument that one hour of discussion will not exhaust the issues it generates. Users of the instrument can extend the length of time devoted to the discussion of issues by arranging several meeting times with the same group of participants. Not every value issue needs to be discussed in a single sitting. Participants can learn a great deal from having taken the instrument and reflected on it privately. In the group, they may choose to discuss the issues that are most significant to them and most relevant to the organization and the objectives of the group session. In Scenario One, issues of diversity are an objective. It is up to leaders of the group process to guide the group to reach this objective.

As the subgroups work, the facilitators move from group to group, taking note of what is and what is not being discussed. With this information, they develop questions related to issues they believe the groups need to address. After one-half hour to forty-five minutes of discussion, the facilitators may wish to have the subgroups break and regroup after the facilitators have displayed on a flip chart, overhead projector, or marker board the issues that the groups should consider discussing.

Sample questions that might be displayed are the following:

- Specifically, how do certain values, needs, wants, or beliefs influence your lives: the goals you have set for yourself, your decisions, your behaviors in the organization? (The more specific participants can be, the better.)
- What impact do you think certain of your values have on your coworkers, supervisors, or those whom you supervise?
- What are the great motivators in your value system?
- What in your value system do you see as a force that will contribute to your working as a team member? What do you see as standing in the way of your working as a team member?
- What in your value system will help you to cooperate with others? What will keep you from cooperating with others?
- Can you keep the values you have and be creative in this organization?
- Who are the individuals you might list as persons you would not want to share your values with? Why? (Name these only if you are comfortable doing so.)
- Do you want to change any of your responses on the instrument? Which ones? Why?
- Are you interested in changing certain values? How? Why?
- What must you and your organization do to accommodate and maximize acceptance of the diversity of values that exist in the individuals in the organization? Is it possible to do so?
- What happens in the workplace composed of diverse individuals when one or more persons do not like to be with individuals from diverse ethnic backgrounds and races?
- What effect can negative attitudes toward the opposite gender, toward disability, or toward nontraditional sexual orientation have on people’s ability to work together? What can we do if such attitudes exist either in ourselves or others?

Facilitators should think through their objectives for the session and develop appropriate questions, which may or may not be similar to the ones above. Facilitators may wish to distribute the questions to participants at the very beginning of the small-group discussion.

**Large-Group Discussion and Work**

(Thirty to sixty minutes.) When facilitators believe that sufficient time has been devoted to small-group discussion and that critical issues have been examined in the subgroups, the larger group of participants is reassembled. The chief focus of the large group (the organizational work unit) is to debrief what happened in the subgroup discussions, to examine the data generated from those discussions, and to assess where the group as a unit should go from here.

As subgroups are asked to debrief their processes, outcomes should be recorded on flip chart, marker board, or other visual aid so that the entire group can see and work with it.

If the group is comfortable enough to strive for specificity and concreteness, the facilitators should guide the group in that direction. It is, after all, in concreteness that behavior can really be explained and that the impetus to change and grow can develop. Questions such as the following might be posed:

- How satisfied is the group with itself in terms of being a cooperative, productive unit?
How much more work needs to be done to create cohesive teamwork? What specific work needs to be done? What issues need to be addressed?

If training is needed, what kind of training is needed? Who should take the lead in providing it?

What does the larger organization need to do to maximize the work unit’s potential?

If facilitators perceive that participants in the large group are uncomfortable and that moving forward in the larger group would be counterproductive, they may deduce that more subgroup work needs to be done. In this case, a follow-up process should be designed to facilitate this work. Rushing through activities for the sake of activity is nonproductive.

Creating learning organizations, as promoted by Senge (1990), can serve as a model for organizational facilitators who attempt to lead individuals to engage in creative dialogue. If units within organizations learn to really communicate, listening takes on a deeper meaning so that trust is built and complex, subtle issues can be uncovered and problems solved collegially. Facilitators who believe in the idea of learning organizations can attempt to guide the large group to communicate and create new ground on which to build solid teamwork. If the subgroup discussions have been thorough and forthright in dealing with value issues, and if the large group is willing to forge new learning, facilitators can help the participants to peel off the veneer of superficial teamwork and develop a truly collaborative work ethic. Facilitators must always, however, take their cue from the observations they make during the small-group discussions and from the tone they detect in the large group to determine the level of learning they should push for.

As indicated earlier, the process outlined above is designed for the situation described in Scenario One. Users of the instrument and facilitators of group process need to be attentive to their unique situations and use their own judgment in devising a process that is tailored to their needs.

As with any learning instrument, the Value-System Instrument should never be used to coerce, chasten, inhibit, or threaten individuals or groups.

REFERENCES


VALUE-SYSTEM INSTRUMENT

Michele Stimac

Step I

Instructions: Consider each of the items below. Decide which belong in your “value system”—the ones that identify or describe a value, need, want, or belief of yours. Place an “S” on the line before those items.

In a few instances, you may not accept an item as a part of your own value system but you may believe that it is acceptable for others to do so. Place an “O” before those items.

Before items that you neither accept as part of your own system nor believe others should accept, place an “N.”

If you are undecided about any items, place a “U” before those.

Only one letter should appear before each item. It is assumed that if you accept an item as part of your own system, you think it is acceptable for others to do so. In responding to each item, try to be as honest as you can.

Scoring Key:

S = a value, need, want, or belief in my own value system
O = a value, need, want or belief acceptable for others but not for myself
N = a value, need, want, or belief not acceptable for myself or others
U = undecided

Step II

Instructions:

1. After you have completed Step I, go back through the items and reflect on how you marked each one. Place an “X” in the parentheses ( ) after any item that you wish you could have marked differently. In other words, identify those items with which you are personally dissatisfied and would like to change.

2. Finally, underline those items that you would be unwilling to share with others. Identify the persons with whom you would not want to share them and write those persons’ names in the margin space next to the items.
### Scoring Key:

- **S** = a value, need, want, or belief in my own value system
- **O** = a value, need, want or belief acceptable for others but not for myself
- **N** = a value, need, want, or belief not acceptable for myself or others
- **U** = undecided

### RACE/ETHNICITY

- _____ races are equal
- _____ ethnic groups are equal
- _____ intermarriage (racial)
- _____ intermarriage (ethnic)
- _____ willingness to socialize with other races
- _____ desire to socialize with other races
- _____ willingness to socialize only with certain races
- _____ desire to socialize only with certain races
- _____ willingness to work with other races
- _____ desire to work with other races
- _____ willingness to socialize with other ethnic groups
- _____ desire to socialize with other ethnic groups
- _____ preference for company of own race
- _____ preference for company of own ethnic group
- _____ preference for socializing with only certain ethnic groups
- _____ refusal to work with some ethnic groups
- _____ willingness to work with any ethnic group
- _____ desire to work with any ethnic group
- _____ unwillingness to intermingle with other races
- _____ unwillingness to intermingle with other ethnic groups
- _____ own ethnic group is superior to others
- _____ own race is superior to others
- _____ other races are superior to own
- _____ other ethnic groups are superior to own
### Scoring Key:

- **S** = a value, need, want, or belief in my own value system
- **O** = a value, need, want or belief acceptable for others but not for myself
- **N** = a value, need, want, or belief not acceptable for myself or others
- **U** = undecided

### GENDER

- [ ] male and female genders are equal
- [ ] own gender is superior to the other
- [ ] control by only males is unjust
- [ ] control by only females is unjust
- [ ] partnership between genders in all matters is right and just
- [ ] the woman’s place is in the home
- [ ] men and women should share domestic responsibilities
- [ ] men should share the nurturing of children
- [ ] traditional male and female roles can be reversed

### DISABILITY

- [ ] persons with disabilities have the same rights as those without disabilities
- [ ] persons with disabilities should have equal access to opportunities
- [ ] willingness to work with persons with disabilities
- [ ] desire to work with persons with disabilities
- [ ] desire to socialize with persons with disabilities

### AGE

- [ ] old age is to be feared
- [ ] old age is the better part of life
- [ ] aged people are physically unattractive
- [ ] aged people are generally useless
- [ ] aged people are generally as beautiful in spirit as young people
- [ ] desire to socialize with aged persons
- [ ] ability to relate well with aged persons
- [ ] wisdom and age go hand in hand
Scoring Key:

S = a value, need, want, or belief in my own value system
O = a value, need, want or belief acceptable for others but not for myself
N = a value, need, want, or belief not acceptable for myself or others
U = undecided

CAREER/PROFESSION/JOB

_______ having a career is more important than being married (      )
_______ having a job is more important than building a career (      )
_______ having a career or profession is more important than developing friends (      )
_______ a career/profession or job is more important than family (      )
_______ having leisure time is more important than building a career (      )
_______ a service-oriented career (job) is more important than a career (job) that only produces goods (      )

EDUCATION

_______ pursuing education for personal growth (      )
_______ pursuing education for professional promotion (      )
_______ pursuing education for monetary gain (      )
_______ pursuing education for aesthetic reasons (      )
_______ pursuing education for joy of discovery (      )
_______ pursuing education for competence (      )
_______ pursuing education for status (      )
_______ pursuing education for power (      )
_______ not wishing to pursue education (      )
_______ education is unnecessary (      )
_______ education is generally irrelevant in the work world (      )
_______ a person cannot get ahead in life without education (      )
_______ life without an education is only partially fulfilled (      )
Scoring Key:
- **S** = a value, need, want, or belief in my own value system
- **O** = a value, need, want or belief acceptable for others but not for myself
- **N** = a value, need, want, or belief not acceptable for myself or others
- **U** = undecided

### PHYSICAL FITNESS/WELLNESS
- ____ being physically fit is important
- ____ exercising regularly is important
- ____ pleasure that comes from eating and drinking is more important than being physically fit
- ____ eating the right foods is important
- ____ moderation in drinking alcoholic beverages is important
- ____ drinking alcoholic beverages in any amount is unacceptable
- ____ drugs of any kind (other than prescription) are destructive to an individual
- ____ prescription drugs should be avoided if at all possible
- ____ prescription drugs can be used without concern
- ____ drugs of any kind can be used liberally

### AESTHETICS
- ____ beautiful surroundings
- ____ the arts
- ____ sports are more important than the arts
- ____ life is incomplete if lived in unattractive surroundings
- ____ beauty is unnecessary
- ____ art is worthless

### URBAN/RURAL LIVING
- ____ preference for living in the city
- ____ preference for living in the suburbs
- ____ preference for living in a small town
- ____ hating the city but not being able to live without it
- ____ preference for rural living
MATERIAL POSSESSIONS

_____ money is very important  
_____ when making decisions, I almost always consider whether or not I will gain money as a result  
_____ money is of little importance when making decisions  
_____ a person can live contentedly with little money  
_____ refusing a marriage partner who has very little money  
_____ getting and keeping money is a top priority  
_____ getting and spending money is a top priority  
_____ having material possessions  
_____ possessions must be expensive  
_____ quality of possessions is more important than quantity  
_____ possessions are unimportant  
_____ relationships are preferable to possessions  
_____ love is preferable to possessions  
_____ wearing expensive clothing is essential to feeling good about oneself  
_____ having an expensive car is important  
_____ having an expensive home is important  
_____ owning a home is important  
_____ not wanting to own a home
### Scoring Key:
- **S** = a value, need, want, or belief in my own value system
- **O** = a value, need, want or belief acceptable for others but not for myself
- **N** = a value, need, want, or belief not acceptable for myself or others
- **U** = undecided

### MARRIAGE/SINGLE LIFE

- [ ] marriage before 22 years of age
- [ ] marriage between 22 years and 30 years of age
- [ ] marriage after 30 years of age
- [ ] no marriage
- [ ] divorce if partners want it
- [ ] no divorce
- [ ] living with a member of the opposite sex outside of marriage
- [ ] commitment without marriage
- [ ] marriage to a man (woman) fifteen or more years older
- [ ] marriage to a woman (man) ten or more years younger

### SEX

- [ ] sex only in marriage
- [ ] extramarital sex
- [ ] homosexuality
- [ ] bisexuality
- [ ] sex only for procreation
- [ ] sex without commitment
- [ ] abortion at will of woman
- [ ] abortion at will of man
- [ ] abortion only at will of both man and woman
- [ ] therapeutic abortion only
- [ ] abortion only in case of rape or incest
- [ ] abortion never
- [ ] in vitro fertilization
- [ ] birth control
Scoring Key:

S = a value, need, want, or belief in my own value system
O = a value, need, want or belief acceptable for others but not for myself
N = a value, need, want, or belief not acceptable for myself or others
U = undecided

PERSONAL FULFILLMENT

_______ being personally fulfilled is more important than making money (   )
_______ being personally fulfilled is more important than having status (   )
_______ being personally fulfilled is more important than owning possessions (   )
_______ a satisfying career is personally fulfilling (   )
_______ a home life is necessary to be personally fulfilled (   )
_______ a spouse is necessary to be personally fulfilled (   )
_______ children are necessary to be personally fulfilled (   )

FAMILY

_______ traditional concept of family essential to health of society (   )
_______ concept of family must be redefined (   )
_______ wanting to have children (   )
_______ children are essential to family (   )
_______ wanting only one child (   )
_______ not wanting to have children (   )
_______ wanting two children (   )
_______ wanting more than two children (   )
_______ wanting a child without marriage (   )
_______ spouse is most significant other (   )
_______ mothers are more significant than fathers (   )
_______ fathers are more significant than mothers (   )
_______ mothers and fathers are equally significant (   )
_______ siblings are more significant than parents (   )
Scoring Key:
S = a value, need, want, or belief in my own value system
O = a value, need, want or belief acceptable for others but not for myself
N = a value, need, want, or belief not acceptable for myself or others
U = undecided

OTHERS
_______ preferring the company of others to being alone
_______ having many significant others
_______ having a few significant others
_______ needing a great deal of time alone
_______ others bring comfort most of the time
_______ others bring pain most of the time
_______ occasionally liking to be alone
_______ not ever liking to be alone
_______ “taking or leaving” others

GOD
_______ there is a God
_______ maybe there is a God
_______ belonging to an organized religion is important
_______ being privately “religious” is better than belonging to organized religion
_______ being spiritual is more important than being religious
_______ there is hell and punishment after death
_______ there is life in heaven after death
_______ there is nothing after life
_______ having a personal relationship with God is important
_______ God is “the Other,” greater than humans, but impersonal
_______ marriage only to someone of the same faith
_______ own religion is only way to God
_______ there are many ways to God
Scoring Key:
S = a value, need, want, or belief in my own value system
O = a value, need, want or belief acceptable for others but not for myself
N = a value, need, want, or belief not acceptable for myself or others
U = undecided

**DEATH**

- _____ death is to be feared
- _____ talking about death is not frightening
- _____ death ends all; there is nothing after death
- _____ death begins a new life
- _____ frequent thinking about death
- _____ ability/willingness to imagine oneself dying
- _____ death is remote
- _____ people are reincarnated

**ECOLOGY**

- _____ concern for the earth and atmosphere is more important than personal convenience
- _____ the earth is here for humankind’s use, however humans wish to use it
- _____ technological advances are more important than preservation of the environment
- _____ human progress is more important than preservation of the environment
- _____ human progress is measured in terms of conquering the universe
- _____ human progress is measured by living in harmony with the earth and with other humans
Scoring Key:

S = a value, need, want, or belief in my own value system
O = a value, need, want or belief acceptable for others but not for myself
N = a value, need, want, or belief not acceptable for myself or others
U = undecided

PEACE/WAR

_______ humankind has outgrown war; war is outmoded
_______ there is no such thing as a just war
_______ peace cannot be attained without justice
_______ war will always be necessary as long as humans inhabit the earth
_______ peace is the absence of conflict
_______ peace is that situation in which conflict is resolved through
discussion, negotiation, or law
_______ the media foster violence
_______ as long as humans exist, there will be violence
_______ violence is abhorrent
_______ humans can vanquish violence

POLITICS

_______ politics as a career
_______ avoiding discussing politics whenever possible
_______ disliking politics
_______ one cannot be in politics and have a sense of peace
_______ one has to participate in politics to have a sense of peace
_______ keeping informed about politics
_______ politics is fascinating
_______ politics “makes the world go ‘round”
_______ being barely knowledgeable about politics
_______ being knowledgeable about politics
_______ total disinterest in politics
_______ politics and morality are incompatible

If you are finishing Step I, refer to page 141 for directions for Step II.
LIFE-ORIENTATION INVENTORY

Udai Pareek

Abstract: This inventory of life style is based on the work of Bray, Campbell, and Grant (1974). In their research, “enlarging style” was associated with more career success, while “enfolding style” was associated with less career success. Although predictors of career success may change over time, knowing one’s life-style orientation and preferences can enhance understanding of individual differences.

The enlarging life style is oriented toward innovation, change, and growth. The enlarger looks for responsibility on the job and is likely also to seek and achieve a position of influence in organizations. Self-development activities are stressed.

The enfolding life style is oriented to the goals of tradition, stability, and inner strength. Enfolders seek to cultivate and solidify those things that invite attention within more familiar spheres. They like to settle into tasks and see them through to a full conclusion.

This instrument uses an organizational and career context to allow a person to assess his or her life-style orientation within the framework of “enlarging” or “enfolding.”

Life-style orientation has been studied largely at the personal level. However, life style is rapidly becoming a consideration at the organizational level. People of “Generation X” do not respond to the same rewards and incentives as their predecessors did. Organizations increasingly face employees for whom life style is a major consideration in their decision making.

The concept of “life style” was originally proposed by Adler in 1930. Adler suggested three characteristics of “style of life”: origin in the childhood, self-consistency, and constancy (Anabacher & Anabacher, 1956). Using the birth-order theory of Adler, Eckstein and Driscoll (1982) suggested ways of assessing life style in a group. Driscoll and Eckstein (1982) also proposed a fifty-item instrument to measure life styles and names of animals were used to represent five life styles: tigers (aggressive), chameleons (conforming), turtles (defensive), eagles (individualistic), and salmon (resistive). Adams (1980), in the context of stress, suggested a simple instrument that used three life-styles: personalistic, sociocentric, and formalistic. However, these instruments are not in the organizational and career contexts.

Various concepts have been proposed for life styles: core values and ideology (Bernard, 1975; Ginsberg, 1966), characteristic mode of living (Lazer, 1963), behavioral pattern with which the individual relates to external reality and internal dispositions (Zaleznik, 1977), pattern of preferences, values, and beliefs about oneself in regard to the work around the person (Friedlander, 1975).

Bray, Campbell, and Grant (1974), in an in-depth and longitudinal study of successful (fast upward movement) and less-successful executives in a well-known organization, identified a number of factors associated with career and role success and
failure. Two distinct patterns emerged from groupings of these factors. The one associated with career success or job success was called “enlarging style,” and the other (associated with less success) was called “enfolding style.” The distinction between the two is contrasted below (based on Bray, Campbell, & Grant).

**Enlarging Style**

The enlarging life style is oriented toward the goal of innovation, change, and growth. The enlarger moves away from the tradition and places emphasis on adaptation, self-development, and the extension of influence outward, into the work and community spheres. The enlarger looks for responsibility on the job and is likely also to seek and achieve a position of influence in organizations. Self-development activities are stressed. Thus, enlargers are likely not only to read, attend the theater, and keep up with current events, but they might take courses and even respond to the promptings of physical fitness and health food.

At the same time, their earlier ties to parents and formal religious practices begin to weaken. Enlargers find that their values have changed so dramatically that they no longer enjoy the company of old friends in the neighborhoods of their childhood. Except for a certain nostalgia when visiting parents and relatives, they are not satisfied with the ties of yesterday. A complete commitment to one's religion is similarly less meaningful, particularly since the enlarger makes every effort to see alternative points of view and to lend himself or herself to new experiences of all varieties. This does not mean that enlargers always break off entirely from their religious groups, but some of them do.

**Enfolding Style**

The enfolding life style is oriented to the goals of tradition, stability, and inward strength. Rather than pitching their strength outward, enfolders seek to cultivate and solidify those things that invite attention within more familiar spheres. They are not joiners of social or community organizations, and when they do enter into these activities, they rarely seek active roles. They value parental ties and seek to keep a relationship active with childhood friends, if this is at all possible.

Enfolders may find it upsetting to leave their hometown areas, even if the move represents career advancement. In a new locale, they are likely to have considerable difficulty feeling at home. They are not likely to attend night college or to study on their own time unless they believe their efforts will directly bring job rewards. An enfolder may begin a self-improvement program, but his or her heart is seldom in it. He or she likes to settle into a job and see it through to a full conclusion, obtaining great satisfaction from a job well done.

The enfolder is not awed by fads. He or she forms a close attachment to a small circle of friends, and most of his or her socializing is done with relatives. Status consideration sometimes embarrasses enfolders, who value informality, sincerity, and genuineness in human affairs. Bray, Campbell, and Grant further describe an enfolder as follows:
Peers and superiors have told him in the past that his attitude is not conducive to upward mobility on the job, but he had not been able to see their point at the time. It seemed to him that it was in the company's interest to keep their employees happy....

He has thought about leaving to enter his own business, but he lacks capital and has some doubts about whether the move would be worth the risk.... One could not consider this man to be unhappy, except in the sense that he somewhat feels embarrassed about his lack of advancement. (pp. 108-111)

THE INSTRUMENT

The Life-Orientation Inventory is based on the Bray, Campbell, and Grant (1974) description of enlargers and enfolders and also on case histories of the two styles. The Life-Orientation Inventory has two scales. Scale A contains fourteen activities pertaining to both orientations. The respondent indicates, on a five-point scale, the amount of time (compared to time spent by other people in his or her group) that he or she spends on each activity. Scale B consists of six pairs of forced-choice items. The respondent again indicates (on a five-point scale) the importance of the two activities when each is compared with the other.

Scoring

The Life-Orientation Inventory contains ten items pertaining to the enlarging style (A: 1, 3, 4, 7, 12, 13, 14; B: 2, 4, 6) and ten items pertaining to the enfolding style (A: 2, 5, 6, 8, 9, 10, 11; B: 1, 3, 5). Ratings on the ten items on the enlarging style are added, and the total score will range from 10 to 50. Ratings on the ten items on the enfolding style are added, and the total score will likewise range from 10 to 50. To convert the scores to percentage terms, use the following formula for each style: (total score – 10) x 2.5. Then the score for each style will range from 0 to 100. On the new scale, a score above 50 would indicate a tendency toward that style; and the higher the score, the higher the probability that the style fits the participant.

Reliability

Even-odd correlations of items—recalculated from Keshote's (1991) data—were .67 and .57, respectively, for enfolding and enlarging styles. The item total correlations ranged from .45 to .64 for enlarging and from .46 to .66 for enfolding scales. These are acceptable reliability figures.

Correlates of the Styles

Using data from about two hundred managers, Keshote (1991) reported correlation of 0.38 between the two styles (significant at .01 level). This is an unexpected finding and needs examination. There seem to be some common elements between the two styles.
Correlation between the two for a smaller sample (twenty) was negative but not significant.

Keshote also reported a relationship between life-orientation styles and some personality variables: self-actualization, locus of control, interpersonal trust, power needs, and managerial styles. For self-actualization, the Inventory of Self-Actualization Characteristics (ISAC) by Banet (1976) was used. In ISAC, scores are obtained on sixteen aspects, and an overall score is also determined. Two aspects, number 3 (spontaneity, simplicity, and naturalness) and number 12 (ethical standards), were unrelated to either the enlarging or enfolding style. Correlations with six aspects (numbers 4, 5, 7, 9, 13, and 16) were significant for both the styles. These are shown in Table 1. Table 1 also gives correlations on aspects significant only for enfolders (numbers 8 and 10) and only for enlargers (numbers 1, 2, 6, 11, 14, 15).

### Table 1. Significant Correlations Between Life-Orientation Inventory Styles and Self-Actualization Aspects

<table>
<thead>
<tr>
<th>Self-Actualization Aspects</th>
<th>Enlargers</th>
<th>Enfolders</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Capacity for peak experience</td>
<td></td>
<td>.30</td>
</tr>
<tr>
<td>10. Interpersonal relations</td>
<td></td>
<td>.19</td>
</tr>
<tr>
<td>1. Efficient reality perception</td>
<td>.25</td>
<td></td>
</tr>
<tr>
<td>2. Acceptance of self, others, human nature</td>
<td></td>
<td>.16</td>
</tr>
<tr>
<td>6. Autonomy of independence of culture and environment</td>
<td></td>
<td>.21</td>
</tr>
<tr>
<td>11. Democratic character structure</td>
<td>.19</td>
<td></td>
</tr>
<tr>
<td>14. Creativeness</td>
<td>.23</td>
<td></td>
</tr>
<tr>
<td>15. Resistance of consultation</td>
<td>.22</td>
<td></td>
</tr>
<tr>
<td>4. Problem-centeredness</td>
<td>.29</td>
<td></td>
</tr>
<tr>
<td>7. Freshness of appreciation</td>
<td>.35</td>
<td></td>
</tr>
<tr>
<td>5. Detachment and privacy</td>
<td>.18</td>
<td>.15</td>
</tr>
<tr>
<td>9. Gemeinschaftsgefühl (empathy for and helping others)</td>
<td>.22</td>
<td>.17</td>
</tr>
<tr>
<td>13. Unhostile sense of humor</td>
<td>.15</td>
<td>.23</td>
</tr>
<tr>
<td>16. Overall</td>
<td>.29</td>
<td>.21</td>
</tr>
</tbody>
</table>

The two items on which there is high correlation with enfolding style relate to existential orientation (both personal and interpersonal satisfaction). Regarding enlargers, all the items relate to autonomy (both of self and others). Therefore, whereas enlargers create autonomy, enfolders are people oriented. Enfolders have higher correlations with sense of humor, and enlargers have higher correlations with problem centeredness, freshness of appreciation, and *Gemeinschaftsgefühl* (identifying with all...
human beings or a desire to be helpful to others). A detailed discussion on the significance of the self-actualization dimensions can be found in Banet (1976).

No correlation was found with interpersonal trust. Both enfolding and enlarging styles had significant correlations with internal locus of control (.14 and .21, respectively). The correlations with external (others) and external (chance) were significant (negative correlation) only with the enlarging style. Locus of control was measured by an instrument prepared on Levenson's (1973) model. Enlargers have low externality (both for others and for chance). On an instrument on power (Pareek, 1994), enlargers valued persuasive power ($r = .18$, significant) and did not feel its deficiency ($r = -.13$, significant). No other correlation was significant.

Using the transactional analysis model of managerial styles, Pareek (1984) found that both enfolding and enlarging styles had positive correlation with operating effectiveness of the adult ego state (problem solving, .12 and .16, respectively), whereas the enfolding style had significant negative correlation with operating effectiveness of regulating parent. Enfolders seem to impose their norms on their subordinates, whereas both enlargers and enfolders have task effectiveness. No other correlations were significant.

In summary, although the two styles seem to have a few things in common, enfolders are more people oriented and less effective in developing self-managing norms. Enlargers are effective in creating autonomy and attribute results less to others and chance. Enlargers seem to be more effective executives.

**Administration and Uses of the Inventory**

The Life-Orientation Inventory can be used for both research and human resource development (HRD). Although instructions are provided on the inventory, a facilitator should be available to clarify the instructions. The participants can score their own inventories. If they are concerned about some of the elements, they may discuss them in small groups of their choice and plan ways to alter the profiles.

**REFERENCES**


LIFE-ORIENTATION INVENTORY

Udai Pareek

Name _________________________________________________________________

Organization ___________________________________________________________

Date _________________________

Instructions for Part A: The purpose of the Life-Orientation Inventory (Bray, Campbell, & Grant, 1974) is to obtain profiles of managers' life orientations. There are no right or wrong answers. For Part A, ask yourself how much time and energy you spend on each activity listed. Then decide how that time and energy compares with the time and energy other members of your group (profession, occupation, level of employment, etc.) are probably spending on that activity. Although you cannot know exactly how much time and energy others spend, your perception is what is important in this inventory. Therefore, circle the number that seems to apply to you, as follows:

Circle 1 if: You spend much less time and energy than the average for your group (i.e., your amounts of time and energy are among the lowest 5 percent).

Circle 2 if: You spend somewhat less time and energy than the average for your group (i.e., your amounts are higher than the lowest 20 percent but still among the lowest 20 percent).

Circle 3 if: You spend about the same amount of time and energy as the average for your group (i.e., your amounts are in the middle 60 percent).

Circle 4 if: You spend somewhat more time and energy than the average for your group (i.e., your amounts are among the highest 20 percent but still lower than the top 5 percent).

Circle 5 if: You spend much more time and energy than the average for your group (i.e., your amounts are among the highest 5 percent).
<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Lowest 5%</th>
<th>Low 5%-20%</th>
<th>Middle 60%</th>
<th>High 5%-20%</th>
<th>Highest 5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reading to broaden knowledge.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Being with your spouse and children.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Exercising to improve physical fitness (swimming, jogging, etc.).</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>Attending courses for self-development.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>Engaging in religious activities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>Engaging in spiritual pursuits or activities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>Acquiring financial assets (shares, real estate, etc.).</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>8</td>
<td>Dealing with problems/matters of your family members.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>9</td>
<td>Contacting and meeting with friends and associates.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>10</td>
<td>Engaging in leisure-oriented activities (hobbies, sports, etc.).</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>11</td>
<td>Socializing (at parties or clubs, with small groups, etc.).</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>12</td>
<td>Taking part in professional associations, societies, activities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>13</td>
<td>Contributing to community service.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>14</td>
<td>Finding and implementing new ways to increase efficiency,</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>commitment of employees, etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Instructions for Part B:* Part B presents six pairs of items. Look at each pair and decide which of the two is more important to you. Circle the number that applies to you, as follows:

**Circle 1 if:** “a” is clearly more important to you than “b” is.

**Circle 2 if:** “a” is somewhat more important to you than “b” is.
Circle 3 if: “a” and “b” are equally important to you.
Circle 4 if: “b” is somewhat more important to you than “a” is.
Circle 5 if: “b” is clearly more important to you than “a” is.

<table>
<thead>
<tr>
<th></th>
<th>“a”</th>
<th>“b”</th>
<th>“b”</th>
<th>“b”</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Clearly</td>
<td>Somewhat</td>
<td>Both</td>
<td>Somewhat</td>
</tr>
<tr>
<td></td>
<td>More</td>
<td>Important</td>
<td>Equally</td>
<td>More</td>
</tr>
<tr>
<td></td>
<td>Important</td>
<td>Important</td>
<td>Important</td>
<td>Important</td>
</tr>
</tbody>
</table>

1a. Work demands.
1b. Demands made by family members. 1 2 3 4 5

2a. Concern for job content.
2b. Concern for job benefits and other advantages. 1 2 3 4 5

3a. Concern for your own family.
3b. Concern for rapid promotions. 1 2 3 4 5

4a. Job placement in your home town or other desired place.
4b. A challenging and interesting job. 1 2 3 4 5

5a. Taking responsibility in a professional/community-service organization.
5b. Spending time with parents, relatives, or friends. 1 2 3 4 5

6a. Continuing and concentrating on a job for a long time.
6b. Searching for and obtaining a job that will give better career opportunities in the future. 1 2 3 4 5

**REFERENCE**

**LIFE-ORIENTATION INVENTORY SCORING AND INTERPRETATION SHEET**

*Instructions:* Transfer the value of the numbers that you circled on the Life-Orientation Inventory to the blanks below. To determine your percentage score, total each column. Subtract ten from each total, then multiply by 2.5. Scores above 50% for either style indicate a tendency toward that style; the higher the percentage, the greater the probability that that style fits you.

<table>
<thead>
<tr>
<th>Enlarging Style</th>
<th>Enfolding Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>A2</td>
</tr>
<tr>
<td>A3</td>
<td>A5</td>
</tr>
<tr>
<td>A4</td>
<td>A6</td>
</tr>
<tr>
<td>A7</td>
<td>A8</td>
</tr>
<tr>
<td>A12</td>
<td>A9</td>
</tr>
<tr>
<td>A13</td>
<td>A10</td>
</tr>
<tr>
<td>A14</td>
<td>A11</td>
</tr>
<tr>
<td>B2</td>
<td>B1</td>
</tr>
<tr>
<td>B4</td>
<td>B3</td>
</tr>
<tr>
<td>B6</td>
<td>B5</td>
</tr>
</tbody>
</table>

Total: __________  Total: __________

Total Enlarging Score: __________ −10 = __________ × 2.5 = __________%

Total Enfolding Score: __________ −10 = __________ × 2.5 = __________%
TIME-MANAGEMENT PERSONALITY PROFILE

Debbie Seid and Kim Piker

Abstract: A person’s “personality” in terms of managing time and priorities can be described according to five different dimensions: attention to task, type of focus, approach to structure, style of processing, and strategy of action.

Each of these dimensions has a range of descriptors. In attention to task, people range from divergent to convergent; in type of focus, people range from detailed to global; in approach to structure, people range from tight to loose; in style of processing, people range from parallel to serial; and in strategy of action, people range from reactive to proactive.

By understanding their own strengths and areas of improvement, respondents can focus their attention on the dimensions of time management that are most problematic to themselves.

Each person has a unique “style” of organizing. Some people are naturally quite organized; others are not. Some are afraid that being too organized will stunt their creativity and spontaneity; others feel comfortable with a structured organizational system. Some people are good at doing many things at once, and some are easily distracted by outside influences.

BACKGROUND AND SUPPORTING THEORY

A person’s “personality” in terms of managing time and priorities can be described according to five different dimensions: attention to task, type of focus, approach to structure, style of processing, and strategy of action. When people understand how they best function in terms of time management, they can develop organizational systems that work best for themselves.

Attention to Task: Divergent or Convergent

The extremes of the dimension of attention to task are “divergent” and “convergent.” It is relatively easy to spot a person whose attention to task is divergent. His or her messy desk is a definite clue. When asked whether or not they are organized, most divergent people would say that they are organized. They might admit to having a messy desk, but would maintain that they know exactly where everything is.

Working with a divergent person can be a challenge for those who are convergent. Divergent people easily wander off the subject to whatever sounds interesting at the moment. This sort of subject jumping makes convergent people very nervous. Whereas convergent people draw energy from completing projects, divergent people draw energy from starting new ones.
Type of Focus: Global or Detailed

The dimension of type of focus has to do with whether a person is detail oriented or globally oriented. Detail-oriented people need facts and details about a situation in order to feel comfortable. They seek out information and verification and prefer situations that can be supported by facts and figures. Such people draw energy from seeking and organizing information.

On the other hand, globally oriented people are more drawn to “possibilities” than the facts of current reality. They enjoy thinking about the future and discussing interrelationships. Globally oriented people often have highly tuned conceptual skills and are drawn to professions such as theater, the arts, upper management, and marketing. Although some globally oriented people also enjoy taking care of the subsequent details, most do not.

Approach to Structure: Tight or Loose

Tightly structured people like to have a system for accomplishing tasks; loosely structured people prefer to have flexibility in how they carry out tasks. For example, tightly structured people prefer that meetings start on time and follow a predesignated agenda. Loosely structured people are fine with meetings starting late and proceeding without an agenda. Tightly structured people have specific places to put specific information. Loosely structured people put information wherever is convenient at the time, resulting in many scraps of paper with valuable information scattered on their desks.

When working on a task, tightly structured people will figure out how to organize and structure what they are going to do before they begin. They will develop the appropriate system for working on the project and adjust it accordingly as the project proceeds. Loosely structured people, on the other hand, put together some system in the beginning, but as the project proceeds, they alter the system or ignore it completely.

Style of Processing: Parallel or Serial

Some people are serial processors and others are parallel processors. Parallel processors are comfortable performing more than one task at a time; serial processors prefer to focus on the task at hand.

When parallel processors have to work with serial processors, they often feel frustrated at the seemingly slow pace of progress. Parallel processors would rather keep all parts of a project in motion at the same time. In contrast, serial processors prefer to begin at the beginning and complete each step thoroughly before proceeding.

Strategy of Action: Proactive or Reactive

Reactive individuals tend to put off today what they can do tomorrow and, as a result, spend a lot of their time responding to crises or deadlines that pop up suddenly.
However, some individuals will score reactive because of particular circumstances at work that are largely out of their control. In contrast, proactive individuals take charge of the day and accomplish what they set out to do. They do not let circumstances or procrastination get in their way. They make a plan and follow it, consequently, they rarely find themselves in last-minute crisis situations.

**DESCRIPTION OF THE INSTRUMENT**

The Time-Management Personality Profile (TMPP) consists of forty items. The items ask participants to respond to each statement in terms of how often they engage in the behavior described. The four-point scale ranges from “almost always” (4) to “almost never” (1). Scores are translated to the five dimensions described previously. The Time-Management Personality Profile has face validity only.

**Potential Uses**

The Time-Management Personality Profile is versatile and can be used in a number of areas, levels, and ways in an organization. Following are some suggestions:

*Use with individuals.* At the individual level, the instrument can be useful to anyone who wants to understand his or her style of time management. In particular, individuals who see themselves as “disorganized” because they are not comfortable with traditional time-management techniques may find validation from this instrument. The extremes of each dimension intentionally are worded to be neutral and to allow individuals to describe themselves in neutral terms.

*Use with teams.* Team members typically work closely together, and individuals with different time-management styles may clash. The Time-Management Personality Profile provides a framework and offers a vocabulary for understanding individual differences and making accommodations.

*Use in training.* The Time-Management Personality Profile can be used in training that deals with stress management, time management, personal effectiveness, and so on.

**Administration**

The Time-Management Personality Profile should be administered before any lecturette on the topic of time management is offered. Having participants complete the instrument before discussing the topic will lessen their tendency to react to the items on the basis of how they expect they should behave.

**Scoring**

After completing the inventory, participants should be asked to transfer the number that they assigned to each item to the appropriate column on the Time-Management Personality Profile Scoring Sheet and to total the five columns. After they have
computed column totals, they should be instructed to graph their results on the Time-
Management Personality Profile Graph.

**Interpretation**

At this point, participants should be given copies of the Time-Management Personality
Profile Interpretation Sheet and be asked to read it. After they have had time to read the
handout, the facilitator can process the information with questions such as the following:

1. What is your reaction to the graph of your time-management personality profile? What dimensions are important to you? What do you notice about the relationships among the dimensions?

2. How does your profile compare with others? How does it compare with your perception of the “ideal” profile? What do these comparisons suggest about your time-management abilities?

3. What generalizations can you make about time-management skills? What generalizations can you make about the five dimensions and how they fit together to compose a time-management personality profile?

4. What specifically do you need to do in order to improve your time-management skills? What dimension needs attention? How can you begin that process? What is one action you can take immediately?

**SUMMARY**

It is important for participants to understand that no one time-management personality profile is best. By understanding their own strengths and areas of improvement, participants can focus on the dimensions of time management that are most problematic to themselves as well as give themselves permission to enjoy their own unique approaches to time management.
TIME-MANAGEMENT PERSONALITY PROFILE

Debbie Seid and Kim Piker

Instructions: Please answer each item according to how often that statement is true for you. Write your answer on the blank that precedes each item, using the following scale:

4 = Almost Always
3 = Often
2 = Sometimes
1 = Almost Never

1. I have so many “to do” lists that I don’t know where to begin.
2. I can make decisions about minor details without needing to know how the overall plan is coming together.
3. I know where I have filed most of my important papers.
4. A busy environment helps me to work more efficiently.
5. I find myself inundated with papers that I have to get to.
6. I get distracted by the unimportant while I am in the middle of the important.
7. If a party is being planned, I enjoy attending to the particulars more than I do planning the theme.
8. I keep my “to-do” list handy.
9. I tend to take on several tasks at one time.
10. I find myself losing sight of long-term goals when dealing with short-term crises.
11. I find myself daydreaming during meetings or discussions.
12. I am good at mapping out the steps needed to complete a project.
13. Telephone and fax numbers for my business contacts are readily accessible.
14. While working on one project, ideas about other projects come to my mind.
15. I put off making decisions until a situation becomes urgent.
16. My mind wanders when I’m working alone.
1 = Almost Never

17. In the midst of working on a project, attending to minor details as they come up helps me to keep on track.
18. I am uncomfortable when my desk is overcrowded with papers.
19. I am eager to start a new project before I even finish an existing project.
20. I prepare for things at the last minute.
21. Interruptions throughout the day affect the amount of work I am able to accomplish.
22. I am very precise in how I handle projects.
23. I keep track of all of my important deadlines.
24. When I talk on the phone during a casual conversation, I also engage in other activities (e.g., cooking, grooming, cleaning, etc.).
25. I avoid delegating work until it’s absolutely necessary.
26. I have scraps of paper scattered about with bits of information on them.
27. I go home with my desk in order.
28. I keep my legal and accounting records updated and in order.
29. During a business phone conversation, I would rather look for a related file while talking than put the person on hold.
30. I find it difficult to make time for the unexpected.
31. I put off today what I can do tomorrow.
32. It is important to capture specific details of business conversations and record them verbatim.
33. I object to meetings that start late.
34. If I am trying to find a street address while driving, I would rather leave the radio on than turn it off.
35. I find myself working long hours and never catching up.

4 = Almost Always
3 = Often
2 = Sometimes
1 = Almost Never

36. When I am in a meeting and someone brings up an interesting but unrelated topic, I join in the discussion about the new topic.
37. I enjoy implementing the details of a project more than I do envisioning the end result.

38. I think that meetings that don’t have an agenda are a waste of my time.

39. If I am walking around a shopping center looking for a particular store, I am comfortable chatting with a friend as I look.

40. I am disorganized because I do not have the time to get organized.
### TIME-MANAGEMENT PERSONALITY PROFILE SCORING SHEET

#### Section 1: Attention to Task

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td></td>
</tr>
<tr>
<td>16.</td>
<td></td>
</tr>
<tr>
<td>21.</td>
<td></td>
</tr>
<tr>
<td>26.</td>
<td></td>
</tr>
<tr>
<td>31.</td>
<td></td>
</tr>
<tr>
<td>36.</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Section 2: Type of Focus

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td></td>
</tr>
<tr>
<td>17.</td>
<td></td>
</tr>
<tr>
<td>22.</td>
<td></td>
</tr>
<tr>
<td>27.</td>
<td></td>
</tr>
<tr>
<td>32.</td>
<td></td>
</tr>
<tr>
<td>37.</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Section 3: Approach to Structure

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
</tr>
<tr>
<td>13.</td>
<td></td>
</tr>
<tr>
<td>18.</td>
<td></td>
</tr>
<tr>
<td>23.</td>
<td></td>
</tr>
<tr>
<td>28.</td>
<td></td>
</tr>
<tr>
<td>33.</td>
<td></td>
</tr>
<tr>
<td>38.</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Section 4: Style of Processing

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
</tr>
<tr>
<td>14.</td>
<td></td>
</tr>
<tr>
<td>19.</td>
<td></td>
</tr>
<tr>
<td>24.</td>
<td></td>
</tr>
<tr>
<td>29.</td>
<td></td>
</tr>
<tr>
<td>34.</td>
<td></td>
</tr>
<tr>
<td>39.</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

#### Section 5: Strategy of Action

<table>
<thead>
<tr>
<th>Question</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
</tr>
<tr>
<td>15.</td>
<td></td>
</tr>
<tr>
<td>20.</td>
<td></td>
</tr>
<tr>
<td>25.</td>
<td></td>
</tr>
<tr>
<td>30.</td>
<td></td>
</tr>
<tr>
<td>35.</td>
<td></td>
</tr>
<tr>
<td>40.</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>
TIME-MANAGEMENT PERSONALITY PROFILE GRAPH

Section 1: Attention to Task
- Divergent: 32
- Convergent: 8

Section 2: Type of Focus
- Detailed: 32
- Global: 8

Section 3: Approach to Structure
- Tight: 32
- Loose: 8

Section 4: Style of Processing
- Parallel: 32
- Serial: 8

Section 5: Strategy of Action
- Reactive: 32
- Proactive: 8

TIME-MANAGEMENT PERSONALITY PROFILE INTERPRETATION SHEET

Attention to Task: Divergent or Convergent

The extremes of the dimension of attention to task are “divergent” and “convergent.” It is relatively easy to spot a person whose attention to task is divergent. His or her messy desk is a definite clue. When asked whether or not they are organized, most divergent people would say that they are organized. They might admit to having a messy desk, but would maintain that they know exactly where everything is.

Working with a divergent person can be a challenge for those who are convergent. Divergent people easily wander off the subject to whatever sounds interesting at the moment. This sort of subject jumping makes convergent people very nervous. Whereas convergent people draw energy from completing projects, divergent people draw energy from starting new ones.

Type of Focus: Global or Detailed

The dimension of type of focus has to do with whether a person is detail oriented or globally oriented. Detail-oriented people need facts and details about a situation in order to feel comfortable. They seek out information and verification and prefer situations that can be supported by facts and figures. Such people draw energy from seeking and organizing information.

On the other hand, globally oriented people are more drawn to “possibilities” than the facts of current reality. They enjoy thinking about the future and discussing interrelationships. Globally oriented people often have highly tuned conceptual skills and are drawn to professions such as theater, the arts, upper management, and marketing. Although some globally oriented people also enjoy taking care of the subsequent details, most do not.

Approach to Structure: Tight or Loose

Tightly structured people like to have a system for accomplishing tasks; loosely structured people prefer to have flexibility in how they carry out tasks. For example, tightly structured people prefer that meetings start on time and follow a predesignated agenda. Loosely structured people are fine with meetings starting late and proceeding without an agenda. Tightly structured people have specific places to put specific information. Loosely structured people put information wherever is convenient at the time, resulting in many scraps of paper with valuable information scattered on their desks.

When working on a task, tightly structured people will figure out how to organize and structure what they are going to do before they begin. They will develop the appropriate system for working on the project and adjust it accordingly as the project
proceeds. Loosely structured people, on the other hand, put together some system in the beginning, but as the project proceeds, they alter the system or ignore it completely.

**Style of Processing: Parallel or Serial**

Some people are serial processors and others are parallel processors. Parallel processors are comfortable performing more than one task at a time; serial processors prefer to focus on the task at hand.

When parallel processors have to work with serial processors, they often feel frustrated at the seemingly slow pace of progress. Parallel processors would rather keep all parts of a project in motion at the same time. In contrast, serial processors prefer to begin at the beginning and complete each step thoroughly before proceeding.

**Strategy of Action: Proactive or Reactive**

Reactive individuals tend to put off today what they can do tomorrow and, as a result, spend a lot of their time responding to crises or deadlines that pop up suddenly. However, some individuals will score reactive because of particular circumstances at work that are largely out of their control.

In contrast, proactive individuals take charge of the day and accomplish what they set out to accomplish. They do not let circumstances or procrastination get in their way. They make a plan and follow it, consequently, they rarely find themselves in last-minute crisis situations.

**Summary**

It is important for participants to understand that no one time-management personality profile is best. By understanding their own strengths and areas of improvement, participants can focus their attention on the dimensions of time management that are most problematic to themselves. In addition they can give themselves permission to enjoy their own unique approaches to time management.
THE CAREER-DIMENSION SURVEY: ASKING THE RIGHT CAREER-DEVELOPMENT QUESTIONS

Caela Farren and Beverly Kaye

Abstract: Organizations are aware of the fact that career-development issues have a strong impact on motivation, satisfaction, productivity, and the competitive edge. Employees’ career goals should be aligned with organizational goals. An organization that is examining its career-development systems can use the Career-Dimension Survey to discover what key areas need to be improved. The five key areas identified are future perspective, organizational systems and practices, work design, managerial support, and individual career-management concerns.

In today's rapidly changing workplace, people are concerned and often confused about their careers. An effective career-development system unites employees' aspirations with the strategic direction of the organization. It helps to ensure that the work force possesses the competence necessary for the organization to fulfill its mission. This article identifies five key factors that help to pinpoint the critical career-development issues in an organization.

1. FUTURE PERSPECTIVE

The view of the future held by the people who work in an organization plays a significant role in determining their actions. People who understand the strategic direction of the organization and see the prospect of a desirable future for themselves will commit themselves to making that future a reality. The following are indicators of the future perspective of a work force.

Organizational Mission and Strategy

Employees need to understand and endorse the fundamental purpose of the organization. Without a clear strategic direction, employees can only surmise which of their actions are mere routine and which are vital for the future. People will go to extraordinary lengths to produce strategically important results, but first they must understand the relationship between present action and future opportunity.

Future Prospects

People need to believe that the organization has a future that holds a place for them. If an organization is retrenching, or the industry is shrinking, employees may be unwilling to exert themselves on behalf of dim future prospects. People who doubt whether their
organization's future holds a place for them reserve their commitment and make defensive, shortsighted decisions.

**Support for Long-Range Planning and Results**

When organizations initiate career-development programs, the hoped-for benefit is usually partnership, with employees linking their personal aspirations to the organization's strategic goals. This form of partnership can occur only in an organizational culture that values long-term results.

**Core Processes and Competences**

Every organization has core processes without which it could not accomplish its fundamental purpose. Each of these processes requires the efforts of people with special competences. People in an organization must recognize its core processes and know which competences are essential for achieving the organization's mission, both now and in the future.

**Preparedness for Technological Change**

Falling behind the technological curve can have drastic consequences for organizations and individuals alike. The organization must identify the new technologies it must master to meet the changing expectations of its customers. It must tell employees when their current skills are in danger of becoming obsolete and help them prepare for the transition to a new way of working.

**Preparedness for Organizational Change**

People cannot plan intelligently for the future if the shape of the playing field continually is being changed without notice. The result of repeated reorganizations can be confusion, resistance, and a perceived loss of control over the direction of one's work life. Employees need to understand why the organization is introducing structural changes. They should have an opportunity to contribute to or comment on planned changes before they are implemented.

2. ORGANIZATIONAL SYSTEMS AND PRACTICES

Career-development programs cannot succeed in a vacuum. They must be integrated with the organization's other human resource practices. One need not map out all the connections among these systems before introducing a career-development program, but it is important to review them as part of the planning process. The practices that follow are likely to either reinforce or undercut an organization's career-development “message.”
Job Posting
People in an organization need to believe that the job-posting system is relevant to the way in which people actually are hired. In many organizations the prevailing assumption is that most positions are “wired” for preselected individuals and are posted only to forestall grievances. In the same vein, job postings are sometimes criticized because the listings do not accurately describe the competences necessary for the positions. If job postings are seen as incomplete, employees will not take them seriously as career-development resources.

Career Information
People in an organization should know where and how to get information about career opportunities within the organization. This is an area in which organizations can take the initiative by preparing easy-to-use informational resources. Unfortunately, information of this type often is relegated to a dusty back shelf in a supervisor's office, leaving most employees unaware of its existence.

Mentoring
Good mentors are scarce. Few senior-level people possess both the time and inclination to groom potential successors. For this reason, some organizations have initiated formal mentoring programs that pair junior or intermediate-level employees with more experienced colleagues. Other organizations have had success with group mentoring programs, in which a senior's savvy can be dispensed to two or three junior people rather than just one. People in an organization should know how to locate a mentor. The organization should know who the best mentors are and how to prepare others for that role.

Compensation
Compensation can take many forms, the most prominent of which is money. Other types of compensation that affect career decisions include flexible scheduling, opportunities to attend professional conferences, and personal recognition of one's efforts. People want to consider themselves fairly compensated for their work. Employees should be rewarded equitably for accepting temporary assignments and for expanding their contributions to the organization even if they stay in the same positions.

Training and Development
People in an organization want to have access to the continuing education and training they need to maintain or upgrade their marketable skills. Organizations can offer developmental activities such as apprenticeships, on-the-job training, and professional-development sabbaticals. Managers can recommend training courses as well as different forms of hands-on work experience.
Developmental Assignments

People in an organization can be assigned to special projects or to other units of the organization in order to help them develop new competences. This powerful learning method is often underutilized because no one wants to undertake the necessary negotiations and paperwork. It is a good sign when people in an organization feel free to request developmental assignments.

3. WORK DESIGN

A third career-development factor to consider is the nature of people's work. We are all affected by the inherent characteristics of the work we do. Most people will tolerate difficult working conditions if they find their own work satisfying. However, if people consider their work unrewarding, the organization can offer few inducements that will sustain a high degree of motivated effort. Redesigning work to incorporate the following factors can have a substantial effect on people's career plans.

Participation

People in an organization want to be consulted about changes that directly affect their work. They want to participate in making decisions as well as implementing them. Work that affords ample scope for participation is generally regarded as more attractive. There is also evidence that suggests that people are more productive when they believe that their views regarding the best way to get a job done are valued.

Empowerment

People like to be encouraged to make necessary decisions about their work on their own initiative. Most people can determine their own work procedures within the standards of responsible practice. Not everybody craves autonomy, but for many people the chance to call their own shots is the pivotal difference between satisfying work or career dissatisfaction.

Meaning

People want to believe that their work is worthwhile. Work can be a cornerstone of personal growth and identity. Its rewards range from the gradual development of mastery in a craft to the satisfactions of accomplishment and service. When one's work seems trivial and dull, it can be a wearisome burden. People who experience little pride or meaning in their work give it correspondingly little commitment.

Teamwork

Effective teams can produce results that exceed the previous levels of performance of their individual members. Of course, some people work better as individual contributors.
rather than as members of a team. But work structured by and for teams has widespread appeal for employees who prefer not to labor in isolation. Participation in self-directed work teams is an increasingly popular career move in many organizations and is well-suited to fast-paced business conditions.

**Feedback from Customers**

People like to see the results of their work. In complex organizations, actions too often are divorced from their eventual consequences. People in these organizations may not receive reliable information about whether their daily efforts make any difference. Built-in feedback from internal and external customers enables people to gauge the effectiveness of their work. This practice pays off in improved service quality and better customer relations as well as increased career satisfaction.

**4. MANAGERIAL SUPPORT**

Discussions between managers and employees are natural forums for career planning. Managers are ideally situated to communicate the direction of the organization to employees and to convey the career interests of employees to the larger organization. Managers' boundary-spanning role enables them to open doors for employees in the wider organization. Aspects of managerial support that affect career development include the following.

**Feedback and Career Discussions**

Effective career management is directly related to the frequency and quality of career discussions. The manager is in a position to suggest steps that will enable the employee to bring himself or herself in line with desired goals. Managers should hold frequent career-oriented discussions with the people in their work units.

**Visibility Opportunities**

One practical form of managerial support consists of assigning people to tasks or projects that take them outside their customary work areas. These special assignments are opportunities for them to make their abilities and potential known in the organization at large. Wise managers help employees develop their own reputations for excellent performance; both the manager and the employee benefit from the impression of strength added to strength.

**Stretch Assignments**

Adults learn most effectively through direct experience. Assignments that require people to acquire and use new abilities to produce actual results are invaluable. At the same time, these assignments build up the “bench strength” of the work unit, with experienced
employees helping to develop their successors in order to increase their own career mobility.

**Advice on Career Options**

Managers, by virtue of their positions, usually have a broader perspective of the organization than is available to the people in their work units. This enables them to offer advice on career options, the roles within the organization that are suited to a particular individual's abilities and aspirations, and what that person needs to do to be considered a candidate. This advice comes from a thorough knowledge of both the present realities and the strategic aims of the organization.

**Rewards for Developing People**

Managers should be held accountable for developing the people who work with them. The organization's best “people developers” should be recognized and rewarded for this contribution. There should be consequences if a manager fails to develop people or holds people back. Managers who are vying to earn reputations as terrific career coaches benefit everyone: the organization, the employees, and themselves.

### 5. INDIVIDUAL CAREER-MANAGEMENT CONCERNS

An important career-development issue is the extent to which people can identify and move among various career options in their organization. Limitations on such movement serve as barriers to setting or attaining personal goals. For the organization, their presence may indicate larger structural deficiencies. Career-management concerns are as diverse as the situations and perceptions of individuals. Those that follow are among the most significant for planning purposes.

**Control**

Some organizations expect people to build their own futures or bide their time. Those who consider themselves the principal architects of their own careers actively seek out or create opportunities to achieve their goals. Those who believe that other people control their careers tend to adopt more passive or apathetic attitudes.

**Plateauing**

Many people feel trapped in their present roles. For some individuals this feeling occurs because they do not see where else in the organization they can go from their present jobs. For others, this concern results from a lack of stimulation in their current roles. People who believe that they are in dead-end jobs are likely to leave the organization, either in fact or in spirit, unless they can be shown how to invent fresh career opportunities.
**Mobility**

Mobility means that people can move easily from one part of the organization to another. In small organizations this is less of an issue, because everyone must step in wherever a need arises. Large organizations, which must track the movement of masses of people, sometimes impose unintended barriers to career mobility in their zeal for order. In “flatter” organizations, fewer people can expect to move up through a multitiered management hierarchy. A increase in the degree of lateral movement is important to prevent people from feeling stuck.

**Variety of Options**

Some organizations offer many different career options; some offer just a few. People want to know how to find out what options are available to them. Job enrichment can be a career-development option. Temporary assignments to special projects or other business units are career options that do not require formal job changes. It is important that people view the career-development possibilities in an organization as open and expandable rather than as cramped and restricted.

**Career Progression**

People need to understand how careers are built in an organization and what one must do to become a serious candidate for a desired opportunity. They need to know which competences will help them achieve their goals and whether it is more beneficial to have a wide range of experiences or to become an expert in a specialized discipline. They need to know whether certain positions or work experiences are necessary prerequisites to increased levels of responsibility.

**CAREER-DEVELOPMENT SYSTEMS**

Career-development systems address the common ground between the individual and the organization. Both have resources to offer and aims to achieve. Accurate needs assessment, careful targeting of pilot groups for intervention, and clear objectives are essential for a successful career-development system. Otherwise the limited resources available for this purpose may be misapplied. When one asks the right questions, the appropriate starting point will become evident.

The new career paradigm is that of an alliance or partnership, with the organization positioned as a community of compatible interests being realized through a common purpose. Paying attention to the key career-development factors can help an organization to assure that this community of interests remains strong and creative.
THE CAREER-DIMENSION SURVEY

Introduction

The Career-Dimension Survey is meant to be a quick way to draw attention to the fact that if career development is to be done well, five critical arenas have to be considered. The survey is designed to assist organizations that are beginning to look at their development cultures. Although many organizations approach the subject of career development from a purely educational point of view, some recognize that education alone will not do. They are motivated to bring lasting change and realize that if a development intervention is to work, one must look at a variety of interrelated systems.

The Career-Dimension Survey is the culmination of over twenty years of research in the areas that truly affect a development effort. It should be utilized to build interest on the part of colleagues and/or senior line managers.

The Career-Dimension Survey is adapted from a larger survey containing 125 questions. Twenty items have been pulled from the original instrument; the four items under each of the five topical areas are those that the authors believe are most indicative of the subsystem under study.

The answers are meant to stimulate discussion, capture insights, and begin a frank conversation about the place of career development within the organization.

How to Administer the Survey

The survey contains twenty items that are to be rated on a scale of one (not true) to five (very true). Respondents are told to rate the twenty items according to how they perceive their organization (or division) responding to their personal career needs. Respondents are instructed to mark their answers directly on the answer sheet provided.

The survey should take no longer than ten minutes to complete.

Presentation of Theory

The theory of the survey suggests that there are five distinct factors that enable an organization to build a successful career-development process. Each of these factors is essential to the design. The five areas are described in brief on the survey form and as follows:

Future Perspective: Understanding and communicating future trends and their implications for the work force.

Organizational Systems and Practices: Other management and human resource initiatives that interact and support the career-management system.

Work Design: The degree to which individuals find their work satisfying and motivating.
Managerial Support: The ability of managers to support the development of their staffs and teams.

Individual Concerns: The ability of the individual to self-manage his or her career.

Prediction of Scores

The facilitator can engage participants in a variety of ways. Depending on the size and scope of the group, the facilitator may want to ask any or all of the following questions:

1. Where do you think this group will score higher or lower?
2. Where will the composite scores of this group fall?
3. Which of the five areas will have the higher scores? Lower scores?
4. How will the five scores fall in each of the major divisions? Which will come out higher? Lower? Why?
5. Which professional group might score higher or lower in these areas? (The facilitator should be more specific, and can list the different professional groups on flip chart paper and ask the group to predict the scores and discuss their predictions.)

Scoring

All respondents should be directed use the Scoring and Interpretation Sheet to score their responses simultaneously. Instructions for scoring appear on the sheet, and respondents merely need to transpose their scores and total their subscores.

Interpretation

The Scoring and Interpretation Sheet provides a scoring key, indicates high and low scores, and provides a brief interpretation of scores.

Posting

All scores can be posted. The quality of the discussion is based on whether respondents are willing to discuss the divergence or convergence of their scores. They can converse about the areas in which their organization (or division) is stronger or weaker.
THE CAREER-DIMENSION SURVEY

Caela Farren and Beverly Kaye

Instructions: Respond to the items below by rating each from one (not true) to five (very true) for your organization (or division).

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Not True</strong></td>
<td><strong>Somewhat True</strong></td>
<td><strong>Very True</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. This organization expects me to take the lead in managing my own career.

2. I coordinate my professional-development plans with the organization's strategic plan.

3. I am free to choose what tasks I will work on from day to day, as long as I deliver the expected final results.

4. My manager encourages me to develop skills that will qualify me for other jobs in my career field.

5. My organization/division uses succession planning to identify and prepare candidates for key positions.

6. Information moves easily between my division and the senior management of the organization.

7. My manager advises me on my career options and alternatives.

8. My job allows me to decide how I am going to do my work, as long as I meet certain recognized standards.

9. My manager discusses with me the probable impact of new technology on our work unit.

10. This division's expected work force requirements for the next two or more years have been explained to me.

11. The final results of my work depend more on an effective team effort than on my individual contribution.

12. I have been told of my standing in the succession plan for key positions in my division.
<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>13. A variety of desirable career options are available to me in this organization.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. This organization assists me to prepare myself for technological changes in my field.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. I initiate career discussions with my coworkers.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. My manager has told me his or her personal assessment of my current competence and ability in the past three months.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. In my work I am involved with many different tasks and/or projects.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Special projects or rotational assignments are available to me for career-development purposes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. I am not sure exactly what my career field or discipline is.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. This organization's long-term plans will result in the availability of more career options in my field.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### CAREER-DIMENSION SURVEY SCORING AND INTERPRETATION SHEET

*Instructions:* Refer to the survey form and locate your score for each item. Fill in your score next to the item number below. Next, add up your scores and fill in the “total” box. Refer to the scoring key to assess your perceptions in each of the dimensions.

<table>
<thead>
<tr>
<th>2.</th>
<th>10.</th>
<th>14.</th>
<th>20.</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>These questions assess the Future Perspective in your organization. A low score in this section could indicate a need to work at communicating the future needs of your organization. It is important for employees to see where they fit in and how new competences will improve their marketability in the future.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>These questions assess Work Design in your organization. A low score in this section could indicate a need to restructure jobs and foster employee involvement. It is important to realize that the nature of the work people do is one of the most influential elements in people's assessment of their career satisfaction and contribution.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>These questions assess Organizational Systems and Practices in your organization. A low score in this section could indicate a need to eliminate conflicting messages between what is said and what is done. It is important to realize that an organization either supports its employees or it does not; people are seldom fooled for long.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>These questions assess Managerial Support in your organization. A low score in this section could indicate a need to help managers increase their effectiveness. It is important to realize that managers' attitudes and behaviors exert a powerful influence on the productivity and professional development of employees.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>These questions assess Individual Concerns in your organization. A low score in this section could indicate a need to encourage employees to take responsibility for their own career development. It is important to realize that if employees fail to acquire new skills, they will not keep your organization ahead of the competition.</td>
</tr>
</tbody>
</table>

#### SCORING KEY

1-7: Need to take action immediately.
8-13: Need to consider further evaluation.
14-20: Need to reexamine from time to time.
THE DEFENSIVENESS INVENTORY

Beverly Byrum-Robinson and B.J. Hennig

Abstract: Defensiveness affects a host of communication functions in organizations as well as individual understanding and perceptions, interpersonal effectiveness, work effectiveness, and organizational effectiveness. This article presents a new model of the defensiveness. The Defensiveness Inventory assesses four dimensions of defensive reactions: feelings of fear and sadness, feeling attacked, consequent behaviors, and sensitivity to flaw. Respondents rate twenty-eight items in respect to a critical incident in which they felt defensive. The inventory can be used for self-discovery and growth, team building, coaching in interpersonal relationships, process consulting, performance-appraisal training, and other applications.

Defensiveness—the act of protecting one’s self—often is viewed as a serious threat to communication and the subsequent success of organizations (Argyris, 1986; Baker, 1980; Giacalone, 1987; Peterson, 1977; Sussman, 1991). Paradoxically, organizational change efforts breed defensiveness, which occurs when clear communication is most needed.

Baker (1980) cites communication as the most influential variable in organizational effectiveness. Clear communication leads to accurate perceptions and the efficient exchange of information between and among individuals. Messages can be analyzed objectively, which helps in making timely, high-quality, and accepted decisions, which leads to individual and organizational effectiveness. On the other hand, defensive communication can lead to inaccurate perceptions, misinformation, and ineffective decisions.

This article provides a framework for conceptualizing defensiveness and presents a Defensiveness Inventory for use by the HRD practitioner. The inventory can be used in both individual and group interventions.

THE IMPORTANCE OF DEFENSIVENESS

Defensiveness affects employee self-understanding, interpersonal effectiveness, and work effectiveness.

Self-Understanding

Self-understanding is an important prerequisite to understanding and relating with others. Self-understanding is enhanced when one can identify the reasons one becomes defensive and the behaviors one exhibits when defensive. If someone tells a trainer in a training session that he or she does not live in the “real world,” so the skills he or she teaches won’t work, the trainer feels defensive. The reasons may be:
- The trainer’s credibility is being attacked, so he or she feels attacked.
- The trainer feels threatened (someone may think he or she is incompetent).
- The trainer feels angry because he or she thinks the skills being taught are very practical.

Because of these feelings, the trainer switches to a self-protective mode, which results in defensive behaviors. These may include:
- Responding with a sarcastic comment.
- Overexplaining and justifying.
- Asserting his or her status as an expert.

Unfortunately, behaviors such as these are unlikely to change the other person’s mind or help the trainer to feel better.

Individuals need to know to what they respond defensively and how they respond defensively. The focus needs to be on their own behaviors (which are under their control), not on the correctness or fairness of the other person’s behavior. In the example above, if the trainer were more aware of the triggering behaviors, he or she could handle the situation better and contribute to a productive outcome.

**Interpersonal Effectiveness**

Interpersonal effectiveness is the ability to communicate effectively and to resolve problems with others. Controlling defensiveness enhances interpersonal effectiveness. Continuing with the example, if the trainer responds with a sarcastic answer to the person who tells him or her that he or she doesn’t live in the “real world,” the trainee may not participate for the rest of the session. If the trainer simply reasserts his or her explanation and justification, the trainee may not feel listened to. If the trainer reasserts his or her status as an expert, the trainee will feel discounted.

Thus, defensiveness results in deterioration of communication, which may lead to withdrawal, win/lose arguments, and/or standoffs. None of these situations allow relationships to be built or problems to be solved.

**Work Effectiveness**

Because defensiveness prevents individuals from establishing trusting relationships, issues cannot be openly discussed; valuable opinions are not offered; and information may be withheld. Problem solving then cannot address all necessary facts. Consequently, defensive behavior polarizes individuals and eliminates the possibility of arriving at creative and collaborative alternatives.
Organizational Effectiveness

To the extent that members of an organization are defensive, organizational productivity suffers. Intra- and interdepartmental communication may be distorted or nonexistent. When the corporate culture is one of protection, the ability to respond to change is reduced.

A Model for Defensiveness

The model used for the original defensiveness inventory was based on Ellis’ (1974) rational emotive therapy, in which an activating event stimulates certain beliefs about the event, which lead to certain reactions. This model demonstrates that the event does not cause the consequence; what goes on in the mind does. For example, if the activating event is “these ideas won’t work in the real world,” and the consequence is anger, then the interceding belief may be that “these skills are great and anyone who disagrees is stupid.” Ellis also includes a “D” for disputation of irrational beliefs, e.g., “maybe these skills are great in my perception; that doesn’t mean that everyone is going to see the benefit in them; I can just try my best to present them as practical tools, and if someone doesn’t agree, that’s ok.” The purpose of this approach is to teach people to control their thinking, so that their reactions and behaviors are more rational (i.e., less defensive).

The model was further extended to include the following:
- activating event
- thoughts
- feelings
- physical reactions
- behaviors
- consequences
A situation stimulates defensive thoughts or interpretations, which stimulate emotions and physical reactions. The thoughts and feelings can intensify one another, resulting in behaviors that lead to consequences. For example, the event is an announcement of company downsizing. The thought is “I’m going to lose my job.” The feelings are fear and anger. The physical reactions are tension and insomnia. The behavior is inability to concentrate and procrastination. The consequences are poor performance.

Based on this model, a survey was developed, with items divided into six sections, each section corresponding to an element of the model. Some examples for each follow.

**Activating Event:**
- I had a personality conflict.
- I thought someone had power over me.
- The other personal verbally attacked me.

**Thoughts:**
- I thought I was incompetent.
- I thought everyone was out to get me.
- I wanted to “get even.”

**Feelings:**
- I felt ignored.
- I felt hurt.
- I felt scared.
Physical Reactions:
- I cried.
- My heart raced.
- I experienced a surge of energy.

Behaviors:
- I blamed someone else.
- I tried to justify my behavior.
- I lectured the other person.

Consequences:
- I could not perform my job.
- My relationship with the other person improved.
- I detached myself from others.

Development and Testing of the Instrument
The instrument was administered to undergraduates at a large Midwestern university. Part 1 of the instrument consisted of a brief description of defensive behavior. Following this description, respondents were asked to recall and describe an incident in which they became defensive. (In its current form, respondents are asked to respond to a work situation in which they became defensive.) In this methodology, the feelings associated with defensiveness are recalled before the respondent reacts to the items. If a situation could not be recalled, subjects were provided with an incident.

The first step in the data analysis was a factor analysis of the items. A principal-components analysis of the items was conducted using an equamax rotation. An eigenvalue of greater than 4.0 was used to determine the optimal number of factors. The factor analysis yielded a 4 factor solution accounting for 40 percent of the variance in scores.

The first factor appears to cluster around items intended to measure the subjects’ emotional reaction to the defensive situation. To a certain extent, the items intended to measure physical symptoms loaded on the same factor.

This may indicate a lack of independence between the physical symptoms and emotional reactions surrounding defensive behavior. This is not surprising, as these two aspects of interaction are highly intertwined and dependent on each other. The highest correlation, however, was among the emotional-reaction statements. Factor one accounted for almost 20 percent of the variance in responses. These items have been retained as a single scale.

Factor two clustered around statements that dealt with emotional feelings of injustice, being attacked, and holding a flawed viewpoint. These items reflect the view of defensive communication that holds that the element of perceived attack in the others’
behavior is an antecedent to defensive behavior. Conflict, injustice, and discontent may reflect inner feelings, which give way to defensive behavior as a coping and/or defense mechanism. This scale would be supported in research on defense mechanisms and defensive communication. Factor two accounted for almost 10 percent of the variance in scores.

The third factor clustered around items dealing with both immediate and long-term consequences of defensive behavior. The element of aggression and emotional reaction remains salient in these items. This factor accounted for 8 percent of the total variance in scores.

The final factor clustered around items that tap into the individual’s sensitivity to a flaw. In the literature on defensive communication, defensiveness is often instigated by an other’s identification of a flaw in the self. The defensive situation may result only when that flaw is one to which the individual is indeed sensitive. This factor accounted for 2 percent of the variance in scores.

### Table 1. Summary of Factor Analysis

**Factor Loadings**

<table>
<thead>
<tr>
<th>Items</th>
<th>Factor 1 Feelings, Fear, Sadness</th>
<th>Factor 2 Feeling Attacked</th>
<th>Factor 3 Consequent Behaviors</th>
<th>Factor 4 Sensitivity to Flaw</th>
</tr>
</thead>
<tbody>
<tr>
<td>I felt depressed</td>
<td>.7371</td>
<td>.1003</td>
<td>.1078</td>
<td>.0780</td>
</tr>
<tr>
<td>I felt scared</td>
<td>.6932</td>
<td>.1614</td>
<td>.0421</td>
<td>.1513</td>
</tr>
<tr>
<td>I felt alone</td>
<td>.6747</td>
<td>.0989</td>
<td>.0688</td>
<td>.0338</td>
</tr>
<tr>
<td>I felt uncertain</td>
<td>.6669</td>
<td>.0209</td>
<td>.2937</td>
<td>.2307</td>
</tr>
<tr>
<td>I thought I was not a good person</td>
<td>.6301</td>
<td>.2413</td>
<td>.0848</td>
<td>.3583</td>
</tr>
<tr>
<td>I felt guilty</td>
<td>.6108</td>
<td>.3082</td>
<td>.1242</td>
<td>.1459</td>
</tr>
<tr>
<td>I felt ashamed</td>
<td>.6016</td>
<td>.3520</td>
<td>.1809</td>
<td>.2327</td>
</tr>
<tr>
<td>I began to tremble</td>
<td>.5986</td>
<td>.3081</td>
<td>.0134</td>
<td>.1763</td>
</tr>
<tr>
<td>I felt sad</td>
<td>.5978</td>
<td>.0524</td>
<td>.4027</td>
<td>.1190</td>
</tr>
<tr>
<td>I felt hurt</td>
<td>.5953</td>
<td>.2842</td>
<td>.1279</td>
<td>.0115</td>
</tr>
<tr>
<td>I felt deflated</td>
<td>.5920</td>
<td>.0648</td>
<td>.0293</td>
<td>.0390</td>
</tr>
<tr>
<td>I felt flushed</td>
<td>.5909</td>
<td>.0804</td>
<td>.0957</td>
<td>.1396</td>
</tr>
<tr>
<td>I felt uninvolved</td>
<td>.5901</td>
<td>.1408</td>
<td>.2008</td>
<td>.1167</td>
</tr>
<tr>
<td>My voice became “shaky”</td>
<td>.5884</td>
<td>.3320</td>
<td>.0818</td>
<td>.2695</td>
</tr>
<tr>
<td>I felt inadequate</td>
<td>.5879</td>
<td>.1793</td>
<td>.1831</td>
<td>.1640</td>
</tr>
<tr>
<td>I felt disappointed</td>
<td>.5624</td>
<td>.2345</td>
<td>.0271</td>
<td>.0939</td>
</tr>
<tr>
<td>I had been wrongly attacked</td>
<td>.2371</td>
<td>.4770</td>
<td>.0258</td>
<td>.0800</td>
</tr>
<tr>
<td>I felt a sense of injustice</td>
<td>.0578</td>
<td>.4345</td>
<td>.0920</td>
<td>.0126</td>
</tr>
<tr>
<td>I had a “personality conflict” with someone</td>
<td>.1409</td>
<td>.4247</td>
<td>.3419</td>
<td>.1343</td>
</tr>
<tr>
<td>I felt discounted</td>
<td>.0787</td>
<td>.4225</td>
<td>.0571</td>
<td>.1773</td>
</tr>
<tr>
<td>I realized there was a</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Items</td>
<td>Factor 1 Feels, Fear, Sadness</td>
<td>Factor 2 Feeling Attacked</td>
<td>Factor 3 Consequent Behaviors</td>
<td>Factor 4 Sensitivity to Flaw</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------------------------------</td>
<td>--------------------------</td>
<td>-------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>flaw in my viewpoint</td>
<td>.3217</td>
<td>.4221</td>
<td>.0061</td>
<td>.0299</td>
</tr>
<tr>
<td>I wanted to hurt the person(s) that made me defensive</td>
<td>.3898</td>
<td>.0223</td>
<td>.6065</td>
<td>.1465</td>
</tr>
<tr>
<td>I wanted to damage something</td>
<td>.3899</td>
<td>.0319</td>
<td>.5745</td>
<td>.2313</td>
</tr>
<tr>
<td>I lectured the person</td>
<td>.1251</td>
<td>.1852</td>
<td>.5068</td>
<td>.4806</td>
</tr>
<tr>
<td>I wanted to get even</td>
<td>.3988</td>
<td>.1465</td>
<td>.2709</td>
<td>.0702</td>
</tr>
<tr>
<td>I became defensive toward person(s) similar to those involved in this situation</td>
<td>.3280</td>
<td>.0432</td>
<td>.4380</td>
<td>.0200</td>
</tr>
<tr>
<td>I screamed</td>
<td>.3010</td>
<td>.1152</td>
<td>.1107</td>
<td>.4723</td>
</tr>
<tr>
<td>I did not let the other person talk</td>
<td>.2359</td>
<td>.2913</td>
<td>.2136</td>
<td>.4055</td>
</tr>
<tr>
<td>I thought that I was different/did not belong</td>
<td>.2703</td>
<td>.1350</td>
<td>.0553</td>
<td>.4051</td>
</tr>
<tr>
<td>I cried</td>
<td>.2923</td>
<td>.1154</td>
<td>.1106</td>
<td>.4011</td>
</tr>
<tr>
<td>I thought my values/beliefs were attacked/challenged</td>
<td>.1231</td>
<td>.0024</td>
<td>.1310</td>
<td>.3209</td>
</tr>
<tr>
<td>I felt uncomfortable with my surroundings</td>
<td>.1904</td>
<td>.0302</td>
<td>.2206</td>
<td>.3050</td>
</tr>
<tr>
<td>I was emotional about the topic</td>
<td>.2756</td>
<td>.2718</td>
<td>.0617</td>
<td>.3032</td>
</tr>
</tbody>
</table>

Items with common factor loadings were retained for use in the final version of the instrument. Statements loading on more than one factor were discarded. The following are the remaining statements, grouped according to the four factors described earlier.

**Factor 1: Feelings, Fear, Sadness**
I felt depressed.
I felt scared.
I felt alone.
I felt uncertain.
I felt ashamed.
I felt hurt.
I felt deflated.
I felt flushed.
My voice became “shaky.”
I felt inadequate.
I felt disappointed.
Factor 2: Feeling Attacked
- I had been wrongly attacked.
- I felt a sense of injustice.
- I had a “personality conflict” with someone.
- I felt discounted.
- I realized there was a flaw in my viewpoint.

Factor 3: Consequent Behaviors
- I wanted to hurt the person(s) that made me defensive.
- I wanted to damage something.
- I lectured the person.
- I wanted to get even.
- I became defensive toward person(s) similar to those involved in this situation.

Factor 4: Sensitivity to Flaw
- I screamed.
- I did not let the other person talk.
- I thought that I was different/did not belong.
- I cried.
- I thought my values/beliefs were attacked/challenged.
- I felt uncomfortable with my surroundings.
- I was emotional about the topic.

Based on the findings, an adjusted model of defensiveness was adopted, as follows:

Gender Differences
The following are the gender differences from the original inventory, administered to 136 students in a university communications course (fifty-five males, eighty-one
females). Differences in percentages by gender are rounded to the nearest whole number.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male  %</td>
<td>%</td>
</tr>
<tr>
<td>Female %</td>
<td>%</td>
</tr>
</tbody>
</table>

1. I thought my values/beliefs were attacked/challenged
   - M 31 10
   - F 46 14
2. I felt uncertain
   - M 21 19
   - F 33 27
3. I had been wrongly attacked
   - M 33 7
   - F 48 11
4. I wanted to damage something
   - M 17 24
   - F 27 33
5. I realized there was flaw in my viewpoint
   - M 15 26
   - F 20 40
6. I felt deflated
   - M 27 14
   - F 38 22
7. I felt uncomfortable with my surroundings
   - M 19 21
   - F 32 28
8. I felt scared
   - M 14 26
   - F 25 35
9. I felt a sense of injustice
   - M 29 11
   - F 50 10
10. I wanted to hurt the person(s) who made me defensive
    - M 19 22
    - F 28 32
11. I felt emotional about the topic
12. I felt disappointed
   M 28  13
   F 47  13

13. I felt discounted
   M 25  10
   F 54  11

14. I felt depressed
   M 19  21
   F 36  24

15. I lectured the person
   M 22  19
   F 32  28

16. I screamed
   M 13  27
   F 27  33

17. I felt inadequate
   M 14  26
   F 32  28

18. I cried
   M  7  33
   F 20  40

19. I wanted to get even
   M 19  22
   F 28  32

20. My voice became shaky
   M 18  22
   F 28  32

21. I did not let the other person talk
   M 17  23
   F 28  33

22. I felt alone
   M 22  19
   F 30  30

23. I had a “personality conflict” with someone
24. I felt hurt
   M 26  14
   F 46  14
25. I felt flushed
   M 20  20
   F 36  23
26. I thought that I was different/did not belong
   M 16  24
   F 20  39
27. I felt ashamed
   M 14  25
   F 20  41
28. I became defensive toward persons similar to those involved in the situation
   M 18  24
   F 37  21

**INSTRUMENT ITEMS AND SCALING**

The final version of the Defensiveness Inventory consists of twenty-eight items. The items ask participants to respond to each statement in terms of how often this statement applied to them in the critical incidents they are remembering. As an option, a critical incident can be given to participants so that they all have the same point of reference for responding. A six-point Likert scale ranging from (1) “never applied to me” to (6) “always applied to me” is used. Individual scores are then calculated for each of the four dimensions described previously.

The six-point scale is utilized because it has been shown that an even number of response options forces people to take a stand, as opposed to an odd number of responses, which encourages a tendency toward the mean. This information is not of the same value when attempting to compare responses to the mean (Paul & Bracken, 1995).

**POTENTIAL USES OF THE INSTRUMENT**

In addition to being used as a self-discovery tool, the Defensiveness Inventory has the following uses:
The inventory can be completed by peers and used in a feedback session. This would work particularly well in a team-building session focusing on interpersonal feedback.

The inventory can be used as a coaching tool for an employee who wishes to improve interpersonal relationships. The coach may complete the form and/or have others complete the form for the person being coached before discussing results.

The inventory can be followed by an experiential activity such as a role play. If the participants thought of their own critical incidents, various critical incidents can be role-played and processed. If a critical incident is given with the inventory, that also can be role-played. Additionally, the critical incidents could be reenacted to have more productive outcomes after the discussion of theory.

The inventory can be used in process consulting. Behavioral parts of the inventory could be used by an observer, or the entire inventory could be administered during process-consultation interviews. The results could be fed back to the team to increase knowledge of the incidents that stimulate defensiveness.

The inventory can be used in performance-appraisal training to demonstrate how people become defensive in that type of evaluative situation.

If the critical incidents are supplied, participants can rewrite them to show how the situation could have been avoided or how they could reduce defensiveness.

**ADMINISTRATION OF THE DEFENSIVENESS INVENTORY**

The Defensiveness Inventory should be administered before any lecturette on the topic of defensiveness is offered. Having participants complete the instrument before discussing the topic will lessen their tendency to react to the items in socially desirable ways.

To begin, provide each participant a copy of the Defensiveness Inventory and read the instructions aloud, telling the participants that they have ten minutes in which to complete the inventory, if given an incident, and fifteen minutes, if they are remembering and recording their own.1

Make certain that the participants understand that they are to respond to the items in terms of their feelings and behaviors that occurred during their personal incidents. If the critical incident is provided to the participants, instruct them to respond as if they were in that situation.

---

1 Some general critical incidents are supplied following this article for the facilitator’s use. If training a homogeneous group, one can create critical incidents based on the group’s work.
**Scoring**

After participants have completed the inventory, ask them to transfer the number they assigned to each item to the appropriate column on the Defensiveness Inventory Scoring Sheet and to total each of the four columns. After they have completed the totals, instruct them to plot their results on the Defensiveness Inventory Profile.

**Interpretation and Presentation of Theory**

A discussion on the interpretation of participants’ scores may begin with the definition of defensiveness provided on the inventory. The facilitator may ask the participants how the definition fits for them. The facilitator may also ask how the incident(s) they used influenced their answers.

After the discussion, the model for defensiveness should be provided, accompanied by an explanation of each of the four dimensions of defensiveness. As an explanation of the model and its four elements is presented, the facilitator may ask the participants how they scored on each element. According to the results on their profiles, they will be more or less likely to exhibit the behaviors, feelings, or thoughts associated with each factor. The higher the score on each factor, the more likely the respondent is to display behaviors described by that factor. The percentages along each factor line indicate the total percentage of people, in a sample of 120, who were as likely as the respondent to display behaviors described by that factor.

The processing questions that follow will help lead participants to applications of the learnings from the instrument.

**Processing Questions**

To improve application, participants can partner with one another before the total-group processing session to discuss their highest and lowest scores and their reactions. The following questions can be asked of participants after they complete the inventory, score it, and hear the theory and interpretation presentations. Scores also can be posted to exhibit any intergroup differences (i.e., between genders, between personal/business situations, between real and provided critical incidents). Normative data follows this discussion.

- What was your highest score? Your lowest? What does that mean to you?
- How does your score fit with the norms? What does that mean to you? How do you feel about that?
- Did anyone notice any gender differences? How does that fit for you?
- How do you think your inventory would have been different if you had thought of a personal, rather than a professional, situation? What does that tell you?
- What have you learned about yourself and defensiveness?
- What have you learned about defensiveness in general?
- What is your hypothesis about how defensiveness affects work relationships? How does it affect the organization?
- What do you want to try to do differently in the future? What reactions or behaviors would you like to change on the job? At home?
- What have you learned about sending messages that engender defensiveness? How might you change your own messages to decrease the likelihood of defensive reactions from others?

REFERENCES


DEFENSIVENESS INVENTORY SAMPLE CRITICAL INCIDENTS

1. Chris enters Casey’s office and puts a report on the desk saying, “I need to talk to you about this. There are a number of holes in the recommendations. If the report is presented the way it is now, we’ll never gain acceptance. You need to do some more research to substantiate your recommendations. I’m not sure why you didn’t do that in the first place.”

*If you were Casey, you would:*

2. Sue has just presented her proposed advertising plan to the other vice presidents. The v.p. of engineering says, “You can’t make those kinds of claims. We’re nowhere near that target in our development. Where did you get your information? That’ll play havoc with the company’s image.”

*If you were Sue, you would:*

3. Dale is conducting a performance appraisal for Jo. Dale says, “It seems that you have completed only half of your objectives for the year. What is your explanation for that?”

*If you were Jo, you would:*

4. Tim and Tom are working together to assemble manuals in a last-minute rush for a course the next day. Tom says to Tim, “Can you speed it up? We’ll never get out of here. Why was this left until the last minute, anyway?”

*If you were Tim, you would:*
DEFENSIVENESS INVENTORY

Beverly Byrum-Robinson and B.J. Hennig

Introduction: Defensiveness is a feeling that almost everyone has experienced. It is human nature to defend ourselves against various types of psychological attacks, dangers, or injuries. Degrees of defensiveness may vary, as may the types of responses. In addition, we may feel more defensive on some days than on others. The purpose of this self-discovery inventory is to explore some of the characteristics of defensiveness so that you may better understand your communication behavior during situations of this kind. The inventory will take approximately ten minutes to complete.

Instructions: Think of an incident at work in which you became extremely defensive. What triggered it? Who was involved? How did you feel? What did you say and do? What was the outcome? Based on the experience, rate the extent to which the items presented below describe your reactions in the situation. Please read each statement carefully and respond by circling the appropriate number for each item. Your first response is usually the most honest.

Key to Ratings

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly Agree</th>
<th>Slightly Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>

1. I thought my values/beliefs were attacked/challenged
2. I felt uncertain
3. I had been wrongly attacked
4. I wanted to damage something
5. I realized there was flaw in my viewpoint
6. I felt deflated
7. I felt uncomfortable with my surroundings
8. I felt scared
9. I felt a sense of injustice
10. I wanted to hurt the person(s) who made me defensive
11. I felt emotional about the topic
<table>
<thead>
<tr>
<th>Item</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Slightly Agree</th>
<th>Slightly Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. I felt disappointed</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>13. I felt discounted</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>14. I felt depressed</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>15. I lectured the person</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>16. I screamed</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>17. I felt inadequate</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>18. I cried</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>19. I wanted to get even</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>20. My voice became “shaky”</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>21. I did not let the other person talk</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>22. I felt alone</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>23. I had a “personality conflict” with someone</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>24. I felt hurt</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>25. I felt flushed</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>26. I thought that I was different/did not belong</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>27. I felt ashamed</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>28. I became defensive toward persons similar to those involved in the situation</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>
DEFENSIVENESS INVENTORY SCORING SHEET

Instructions: From your completed Defensiveness Inventory, transfer your responses to the appropriate squares below. For example, if you have circled a 2 on item 13, write 2 in the square numbered 13.

Once you have transferred your scores, calculate a total for each column on the line provided. These are your factor scores, to be transferred to your Defensiveness Inventory Profile Sheet.

<table>
<thead>
<tr>
<th>F1</th>
<th>F2</th>
<th>F3</th>
<th>F4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scoring Box</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#2</td>
<td>#3</td>
<td>#4</td>
<td>#1</td>
</tr>
<tr>
<td>#6</td>
<td>#5</td>
<td>#10</td>
<td>#7</td>
</tr>
<tr>
<td>#8</td>
<td>#9</td>
<td>#15</td>
<td>#11</td>
</tr>
<tr>
<td>#12</td>
<td>#13</td>
<td>#19</td>
<td>#16</td>
</tr>
<tr>
<td>#14</td>
<td>#23</td>
<td>#28</td>
<td>#18</td>
</tr>
<tr>
<td>#17</td>
<td></td>
<td>#21</td>
<td></td>
</tr>
<tr>
<td>#20</td>
<td></td>
<td>#26</td>
<td></td>
</tr>
<tr>
<td>#22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#24</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#27</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Factor Scores</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F1 =</td>
<td>F2 =</td>
<td>F3 =</td>
<td>F4 =</td>
</tr>
</tbody>
</table>
DEFENSIVENESS INVENTORY PROFILE SHEET

Instructions: Transfer your factor scores from the Scoring Sheet to the boxes below. Once you have done this, plot each score at the appropriate point along the Factor Line. The lower your score (vertically), the more likely you are to display behaviors described by the factor.

The percentages along each Factor Line indicate the total percentage of people in a sample of 120 who were as likely as you to display the behaviors described by each factor.
DEFENSIVENESS INVENTORY INTERPRETATION SHEET

**Factor One**

Scoring above the mean on factor one, feelings of fear and sadness, indicates that in a defensive situation, you experience the more “passive” emotions of anxiety and hurt. You may feel inadequate to deal with the situation and may find it difficult to argue for your point of view.

Scoring below the mean on factor one may indicate confidence in your viewpoint, regardless of disconfirming messages. You may also have the ability to avoid taking things personally.

**Factor Two**

Scoring above the mean on factor two, feeling attacked, indicates that in a defensive situation, you experience more “active” emotions of anger and conflict. You may tend to believe that the situation is being handled unfairly or addressed inappropriately. These feelings may lead you to defend your point of view.

Scoring below the mean on factor two may indicate the ability to see both sides of an issue without feeling threatened.

**Factor Three**

Scoring above the mean on factor three, consequent behaviors, indicates that, in a defensive situation, you want to take strong action toward the situation or person. You may tend to hold on to defensive feelings until your desired resolution is attained.

Scoring below the mean on factor three may indicate an ability to control aggressive emotional reactions.

**Factor Four**

Scoring above the mean on factor four, sensitivity to flaw, may indicate a variety of strong feelings and responses to the situation. The behaviors and feelings in this factor are emotionally extreme, from feeling different to emotional outbursts of crying and screaming. These extreme reactions may stem from a general oversensitivity when you are challenged.

Scoring below the mean on factor four may indicate a general self-confidence and ability to handle challenges with extreme reactions.

Scoring high on factors one and two and low on factors three and four may indicate that you hold your emotions of defensiveness inside, rather than acting them out or expressing them. Conversely, scoring high on factors three and four may indicate a tendency to act at the time on your emotional state.
SUGGESTIONS FOR IMPROVEMENT

Defensiveness may be reduced by learning any of the following skills:

- **Self-talk**: to view the other person’s comments as information about his or her viewpoint rather than as information about you
- **Perception checking**: to determine if what you are perceiving the situation to be is correct
- **Paraphrasing**: to understand the other person’s point of view
- **Calling time out** and setting an appointment to talk at a future time
- **Using “I” messages** to express to the other person how his or her messages affected you
- **Requesting** that the person word his or her concern in a way that is easier for you to hear it
- **Asking open-ended questions** to elicit the other person’s real concerns, i.e., what the person wants/needs
- **Asking for** specifics, examples, or preferences
- **Using conflict-management skills** to move toward resolution of the issue, as opposed to focusing on the problem
THE PROCESS FACILITATION INVENTORY (PFI)

Arthur M. Freedman

Abstract: The Process Facilitation Inventory (PFI) can be utilized in at least six different ways to assess the process-facilitation skills of participants. The instrument is designed so that different steps can be selected for different applications. The combination of individual and group work allows the participants to compare their perceptions and responses with those of others, to share information and techniques, and to apply their learnings in amending their individual and group responses.

OBJECTIVES OF THE INSTRUMENT

There are six potential purposes for using the Process Facilitation Inventory (PFI):

1. As a self-assessment tool for organization development (OD) practitioners (steps 1, 2, and 6).

2. To identify the relative strengths and weaknesses of the members of teams composed entirely of OD practitioners or of multidisciplinary teams that include OD practitioners (steps 1, 2, 3, 4, and 6).

3. As a means of assessing and training novice OD practitioners (steps 1, 2, 3, 4, and 6).

4. To screen applicants for positions as OD practitioners (steps 1, 2, and 6 [for evaluators]).

5. To orient representatives of prospective client systems to ensure that they have realistic, appropriate expectations of OD practitioners (steps 1, 2, and 6).

6. As a midterm or final examination for a course on group process facilitation in a university-based graduate program in organization development (all 6 steps).

The instrument format is inspired by the format used by Fritz Steele (1975) in The Catalytic Action Test. There are preferred types of responses based on proven “best practices.” Subgroup and total-group discussions following individual responses to the inventory are intended to surface issues, assumptions, additional possibilities and options, and further learnings.
ADMINISTRATION OF THE INSTRUMENT

The time required to administer the PFI ranges from three hours, fifty minutes, to four hours, ten minutes, depending on the steps used.

Step 1. In the first ten minutes, the administrator will present the appropriate goals of, rationale for, and instructions for taking the Process Facilitation Inventory.

Step 2. During the next thirty to fifty minutes, the participants will respond individually to each of the ten scenarios.

Step 3. In the next thirty minutes, when individual work has been completed, the administrator will create ten small groups and assign one of the ten scenarios from the instrument to each of the groups. The task for each small group is as follows:

- Identify the central issue(s) in the small group’s scenario—to be recorded under “Thoughts and Feelings” on the Process Intervention Inventory Group Sheet;
- Determine a mutually agreeable process-intervention strategy, including probable dialogue—to be recorded under “Words and Actions” on the group sheet; and
- Select one group member to make a flip-chart presentation of the subgroup’s completed work to the total group.

Step 4. In the next hour and forty minutes, each spokesperson for a small group will deliver his or her flip-chart presentation. Members of the total group are invited to (a) ask for clarification or elaboration, (b) suggest other conceptualizations of the scenario’s central issue(s), and (c) suggest optional intervention strategies or possible dialogues.

Step 5. (If the PFI is administered as a graded test in a graduate school program, between classes individual graduate students can be encouraged to use their original individual responses, the results of their small-group discussions, and the results of the total-group presentations as the bases for considering whether to rewrite their responses to each of the ten scenarios.)

Step 6. In the next hour, the administrator (consultant or trainer) will distribute the Process Facilitation Inventory Typical Problems and Answers Sheet to the participants and will deliver a theory briefing to the total group of participants, based on the sheet. This is done after step 3 if the instrument is not used as a graded test; it is done after step 4 when the instrument is used as a graded test in a graduate school course. The administrator will allow time for questions and answers between scenarios.

After the issues and theory are presented, the participants are given copies of the Process Facilitation Inventory Preferred Responses and are “walked through” them. Having the issues and theory input first makes it easier for participants to understand the rationales behind the responses.

Materials and Equipment Required

Prior to administering the PFI, the consultant, trainer, or professor will need to assemble the following materials:
- A copy of the Process Facilitation Inventory and a copy of the Process Facilitation Inventory Typical Problems and Answers Sheet, plus writing materials, for each participant.

- One additional copy of the Process Facilitation Inventory to be used as the Group Sheet.

- Several flip charts, felt-tipped markers, and masking tape for posting newsprint sheets.

- Ten round tables, one for each subgroup.

**REFERENCES**


PROCESS FACILITATION INVENTORY

Arthur M. Freedman

Instructions: Place yourself in the role of process facilitator (PF) in each of the following scenarios. As precisely and as honestly as possible, write the following for each of the scenarios.

1. In the box with rounded corners and “bubbles,” for each scenario, write your **thoughts** about the central issue(s) and your personal strategy for your process-facilitation intervention as well as the **feelings** you are likely to experience as you prepare yourself to respond in a facilitative manner.

2. In the box with squared corners and a curved line, write the **words and actions** you would use to execute your intervention for each scenario.

Please print in BLOCK LETTERS. Do not be concerned about writing space; if your responses are too long for the spaces provided, simply continue writing anywhere near the cartoon on the front or back of the sheet. However, please label your continuations as either “TF” or “WA.”

---

1 Inspired by the format that Fritz Steele presented in “The Catalytic Action Test.”
**Scenario 1.**

We’ve heard a great deal about the team-development program. We’re really eager to have you here to run our management team meeting.

Right! Take over.
Scenario 2.

Well, people, what are we going to do about the failure to reach our projected revenues?

I think we ought to...

Manager

No! That's not it! The customers just aren't buying!

How about getting a new marketing manager?

Oh, keep quiet! You never have any decent ideas!
Scenario 3.

Well, that was a good piece of work that we did. I'm sure our customers and other stakeholders will be both impressed and satisfied with our work.

Absolutely!

You bet!
Scenario 4.

Now, you've silently observed two of our team's management meetings. What do you have to tell us or show us in the way of results?
Scenario 5.

I'm sure you appreciate how swamped we are right now—what with all the fallout from the reengineering and the rightsizing. We've decided to push back your consultation until the dust settles.

Yeah, maybe we'll be able to find some time later, down the road. Then maybe we can help you out.

Right, no time to spare, man. We're up to our ears in it right now.
Scenario 6.

Well, what do you intend to do to stop all those emotional outbursts that keep cropping up and disrupting our business meetings?
Scenario 7.

By discussing those two issues with the plant manager after our last meeting, you broke confidentiality. After all, we didn’t agree that you could do that. We’re real disappointed in you.
Scenario 8.

I’ve had it with you and your damned consulting tricks! You keep pushing on how my actions affect other people! You’ve made me look like a fool or an idiot in front of all my buddies and in front of my boss!
Scenario 9.

I cannot condone or tolerate the practice of hiring incompletely trained OD consultants and putting them in critical positions in this complex, fast-moving project without close supervision. I think it's unethical, and it puts the whole project in jeopardy if they screw up.

Look, the client system is desperate. We have to show that we are responsive to their needs. Besides, they don’t know the difference. If we do otherwise, we’re likely to lose credibility and the contract along with it. You’d better put a lid on it! After all, there are a lot of people looking for work, and you are not indispensable!
Scenario 10.

So, let's summarize our status. We've completed an action plan to deal with the issue that top management assigned to us. Now we're ready to plan our next steps.

Well, I have some questions about the involvement of the other groups who will have to cooperate and support the implementation of this plan—if it is approved. They haven't been involved in this process.

That may be true, but I'm concerned about how the executives will react if we just storm into their meeting and demand that they approve our plan. Couldn't they fire us for insubordination?

I think we should set up a meeting with the executive management team and tell them what we think they should do.

Yeah, and they will totally lose their credibility about creating a participative and high-involvement culture here if they reject this plan.

Well, we asked them to send a representative. They didn't! So it's their problem!
PROCESS FACILITATION INVENTORY
PREFERRED RESPONSES

SCENARIO 1

Thoughts and Feelings
The central issue is the role of the facilitator. There is a mismatch between what client system (CS) members expect and what the PF should/should not do. Determine the basis of their expectations, how they concluded that the consultation is a “program.” Determine the significance of this designation for them. CS members may think the PF is supposed to be a replacement for their manager during these meetings or they may be trying to set the PF up to compete with (or upstage) their manager. Consider why the CS Manager is not participating. He or she may want the PF to relieve him or her of leadership responsibility.

Words and Actions
Negotiate (or renegotiate) the consulting agreement. Inquire: What have they heard about the “team-development program?” From whom? Illuminate (gently), clarify, and realign CS members’ expectations with those of the PF. Specifically, focus on the difference between running a meeting and facilitating. Look for indications of possible hidden agendas.

NOTES:
SCENARIO 2

Thoughts and Feelings

The group is operating in a disorganized and nonsystematic way under considerable tension. Two central issues: (1) the group is shifting between identifying causes and searching for solutions without specifying either the current situation or the desired state; (2) there is increasing tension as a function of interpersonal competition in attempting to force agreement on a single cause of a complex issue. Each CS member describes a suggested action (or some aspect of one of the probable contributing causes). Rather than collect, organize, and display each of these perceptions or perspectives (on a flip chart or whiteboard) as a prelude to a systematic analysis, CS members attempt to conduct a verbal situation analysis. The consequence is unnecessary and counterproductive competition and increasing tension.

Words and Actions

Help the group to refocus. Ask “What are you trying to accomplish right now?” “How well are you doing?” “How are you feeling?” Then, as or if necessary:

1. Use some method, such as the S-T-P model (Fosmire & Wallen), to help the team members to organize their ideas in a systematic manner and to specify their perceptions of the current and desired states. For example, ask, “How do you understand the current situation?” “How would you prefer things to be?” “For which current issue are you proposing solutions?” “If you implemented any of these recommended solutions, what would you expect to achieve?” Record responses on a flip chart or whiteboard.

2. As/if needed, introduce, describe, and guide CS members through a highly visible form of root-cause analysis (e.g., the Ishikawa [1985] fishbone diagram); otherwise use descriptions of current and desired states to facilitate a force-field analysis. The process must honor and display (on flip chart or whiteboard) each person’s contribution.

NOTES:
**SCENARIO 3**

**Thoughts and Feelings**

The central issue is that boundary-management processes have been neglected. CS members do not indicate that they paid attention to or had significant involvement with their “customers and other stakeholders” during the “work.” The work results belong to this group or subsystem; its customers and stakeholders were intentionally or inadvertently excluded. They will be neither impressed nor satisfied; they will neither feel committed to nor support the use of the results.

**Words and Actions**

1. Make no assumptions. Collect information. Ask about the role played by the “customers and other stakeholders” during this group’s work. How actively were they involved? How often and in what manner did they participate? Were any customer or stakeholder groups represented in this group? By what form of representation (statistical or interactive)?

2. Depending on the results of the inquiry, invite CS members to consider some process to submit their “work” to their customers and other stakeholders for their feedback and approval or recommendations, so they can obtain a sense of ownership.

NOTES:
**SCENARIO 4**

*Thoughts and Feelings*

The central issue may be that the CS manager expects the PF to function like a typical “techspert,” who diagnoses and prescribes for the CS, without the active participation of CS leaders and members. What specific “results” does the CS manager expect? Do CS members have the same expectations as the manager? Were these included in the original consulting agreement? (It is likely that this is a naive group that has no conceptual framework by which to think of teamwork and process consultation other than in terms of “results.”) However, the CS manager’s concern with results allows the PF to explain and seek the group’s commitment to conduct regular process-analysis sessions (e.g., at the end of each meeting).

*Words and Actions*

Refer to and clarify or renegotiate the original consulting agreement. Check whether the CS leader and members have common expectations for the purposes, strategy, methods, and results of process consultation. Probe (gently) to determine the group’s sophistication about teamwork and process consultation. CS leaders and members must share common assumptions, definitions of terms, and expectations with the PF. Build on the CS manager’s question by suggesting a regular process-analysis session; provide explanations as necessary.

NOTES:
SCENARIO 5

Thoughts and Feelings

The central issue is that the group members have made some form of self-diagnosis and decided that the PF is an undesired complication or intervention. At the very least, the PF must ensure that this is an informed rather than self-protective or impulsive decision. Overload could be a convenient justification for getting rid of the PF. Several possible base issues may exist:

1. CS members may fear that the PF may discover and illuminate some unrecognized inadequacies, defects, or deficiencies of CS leaders and members—which may threaten their self-esteem or embarrass them. If the PF were to report any perceived “weaknesses” during a restructuring effort, these people may lose their jobs. Confidentiality could be a critical factor that CS members are not likely to surface for discussion.

2. CS members do not recognize (or believe) that the PF can help them to deal with the overload; rather, they anticipate that the PF’s activities will add to their unprecedented overload or distract them from “critical” work.

3. CS members want to simplify the complex situation and may now be trying to induce the PF to endorse or validate this effort.

4. At least one member seems to think that the PF—not the CS or its members—is the intended beneficiary of the consultation (“Then maybe we can help you out”). Sensitive clarification of the consulting contract is necessary.

Words and Actions

While sidestepping the obvious manifestations of resistance (for now), adopt an attitude of intense interest and curiosity. Initiate a dialogue that will uncover and specify the members’ implicit theory or assumptions. The following are examples:

1. “No, I was not aware that you felt swamped, nor was I aware of all the fallout. Can you help me to understand what you are up against?”

2. “It sounds like you think things would be better without me rather than with me. That confuses me. I see my role as helping you to improve things, not to make it more difficult for you. But I may not have the complete picture. Can you help me to understand how you see it?”

3. Summarize what the group members are saying in the form of a “balance-sheet grid” that the group can use as the basis for an informed decision. Ask if this is an accurate reflection of how the group members made their decision to reject the PF’s assistance. Add new information to the grid. Ask if this way of looking at the data changes their decision or confirms it.
4. If they remain determined to reject assistance, consider making a special, one-time-only offer: “You may be right in assuming that my involvement at this time could complicate matters. OK, give me one week (three days minimum). I’ll work right alongside you folks. If, at the end of that time, you don’t think I have added value to your efforts, I’ll leave, with no charge and with my thanks for the opportunity. If you think that I have added value, we can renegotiate our consulting agreement.”

NOTES:
SCENARIO 6

Thoughts and Feelings

The central issue is this: What is the behavior that the CS manager labels “emotional outburst”? The CS manager may be asking the PF to eliminate symptoms rather than to help the group to identify and deal with underlying causes. It is important to determine whom the CS manager is speaking for and whether the other CS members are just as concerned. Is the manager acknowledging helplessness or challenging the PF to prove his or her competence, or both? If the behaviors really are emotional outbursts, the following is germane: Emotional outbursts do not just happen. When outbursts seem to be out of place or out of proportion to the significance of the issues, it may be that the group has adopted norms that restrict the expression of some points of view (or the expression of divergent views). When CS members’ views are labeled “unacceptable” or “irrelevant,” the members become frustrated. This frustration intensifies when members believe that attention has been deflected away from “critical” to “trivial” issues but they cannot say this. They need some means of expression even when they believe they cannot address the critical issues directly, so they find indirect opportunities; they focus on trivial, unrelated issues that are accepted as “legitimate” subjects for discussion. This is called “displacement.”

Words and Actions

The intervention should be aimed at helping the CS leader and members to identify the sources of the “emotional outbursts.” It is important to determine the following:

1. Whether CS members agree with the leader—whether they agree that the behavior represents an “emotional outburst.” If so:

2. Does this group have a history of similar emotional outbursts? When? About what issues? How often? Under what circumstances? Or is this outburst an unusual event?

3. What are the outbursts connected to? The issue under discussion? Another issue? Restrictive norms about what is/is not acceptable to discuss?

CS members may not be willing to discuss this whole issue in public; to do so may be another violation of norms. Consider individual interviews to collect more valid, detailed information.
NOTES:

SCENARIO 7

Thoughts and Feelings

There seem to be two central issues here:

1. The PF has violated trust and the consulting agreement (confidentiality). He or she may think there are good reasons for this (e.g., role conflict as a result of divergent obligations to the team and the plant manager). However, these reasons should have been surfaced by the PF during negotiations regarding the original consulting agreement. Perhaps the term “anonymity” should have been used, rather than “confidentiality.” Now, hard-earned trust has been quickly lost. Rebuilding trust is a much longer-term process than the original process of developing trust based on initial faith in the PF. CS members now feel betrayed and vulnerable to higher authority because of the PF’s action. The CS group may not be willing to try to rebuild trust in—or to continue to use—the PF.

2. The plant manager wants to be kept informed. The PF has multiple obligations but must avoid accepting the role of a covert source of information. Otherwise, the PF places himself or herself in an impossible position. The task is to enable the CS team to communicate with the plant manager and to facilitate that process.

An alternative would be to conceive of the PF’s conversations with the plant manager as part of an information-gathering process that engages the team’s various stakeholders. If this approach is taken, the team leader has misconstrued the transaction between the PF and the plant manager. However, the PF should have negotiated this with the team in advance.
Words and Actions

1. Focus on (a) modeling how one can admit making a major mistake; (b) what all involved parties—including the plant manager—can learn from this experience; (c) where the PF and the group can go from here (i.e., is there any possibility of renegotiating a more realistic consulting agreement so that the consultation could be continued?).

2. A renegotiated agreement must include consideration of how the group will keep the plant manager informed of progress and how the plant manager can make sure the group is addressing his or her concerns, priorities, and requirements.

As an alternative, if the information-gathering approach is taken, the PF must either remind the team of the existing agreement (if it included contact with the plant manager) or use the event as a learning experience and renegotiate the consulting agreement.

NOTES:
**SCENARIO 8**

**Thoughts and Feelings**

The central issue is that the CS member seems to have been enduring unpleasant activities (i.e., being the recipient of unexpected, disconfirming feedback) for some time. The member may be displacing pent-up feelings from other sources (other CS members or the leader) to the PF—a “safe” target. It seems that the member has reached his or her limit (level of tolerance) and is now trying to protect himself or herself from perceived threat or embarrassment. The PF may have assumed that encouraging CS members to give one another feedback was legitimate without discussing it with the group or incorporating it explicitly into the consulting agreement. Other CS members may have been storing up a lot of criticism of this person’s behavior; now they believe they have permission to unload (dump) on him or her.

It also is possible that the PF was providing unsolicited feedback or providing feedback without adequately involving other CS members. It also is likely that the PF failed to mention the norm that it is acceptable for any team member to call a halt to a feedback process when he or she feels overloaded.

Additionally, feedback from other CS members would validate or disconfirm this person’s fears about how he or she looks to them. However, if this approach is appropriate, the uncomfortable member should be in control of the process.

**Words and Actions**

It is vital that the CS member believe that the PF is genuinely empathic (not patronizing) in acknowledging the member’s intense feelings. The PF must help the member to find some way to restore his or her dignity and respect. The PF must not treat the member as a casualty or as a defective or inadequate person. The PF must help the other group members to find some honest and rational way to legitimize this member’s outburst.

If giving, receiving, and using feedback were not included as critical elements of the original consulting agreement, it is time to renegotiate that agreement. It probably would be useful to review the purposes of feedback and the guidelines for giving and receiving feedback. If the other CS members have not given this person any feedback, give control to this person by asking if he or she wants such feedback and from whom. Help this member to function as his or her own gatekeeper.
NOTES:

**SCENARIO 9**

*Thoughts and Feelings*

There are three central issues:

1. Two competing principles of consultation are surfaced. The individuals are treating it as an “either-or” (win-lose) issue, but both positions are based on legitimate concerns. One is based on professional PF ethical principles; the other is based on the pragmatics of fee-for-service consultation. Thus, it is a dilemma to be managed—not a problem to be solved—by the PF team. If only one PF were involved in the consulting engagement, this would be an internal dilemma to be managed.

2. The OD department manager is using only partly veiled threats to induce the OD team leader to accommodate.

3. The PF team member has not been invited to intervene or to participate in senior colleagues’ issues.

   Another response might be, “Oh my God, this guy doesn’t see me as a professional. One way to demonstrate my skills and courage as a PF would be to intervene in this situation right now.”

*Words and Actions*

1. The PF team member must first solicit permission to become involved in the issue. This must include the specific role he or she might play.

2. If the PF team member comes in as a process facilitator (not as an advocate), he or she must help the team leader and department manager to change their points of view from “either this or that” (a problem to solve) to “this and that” (a dilemma to manage).
3. The PF may choose to defer or ignore the issue or to invite the team leader and department manager to explore the impact of threats on their working relationship.

NOTES:

**SCENARIO 10**

**Thoughts and Feelings**

The central issue is that boundary management processes have been neglected. This CS team has done its work in isolation from the other parties (stakeholders and constituents) who are likely to be involved in the implementation of the action plan or who will be impacted by its implementation. Having completed the action plan, the team members are suddenly aware that they have a job of selling it to previously uninvolved parties—especially to senior management. They are beginning to allow themselves to become aware of the possibility that their work (in which they are strongly invested) may be rejected. The tension is rising quickly. The team members may feed off one another’s fears to the point where they panic. They are raising many different but interrelated concerns. There is a very real risk that many important issues will be lost in the shuffle.
**Words and Actions**

The team must get all concerns posted on a flip chart or whiteboard to serve both as the group’s “memory” and as a mechanism for binding the members’ fears to something concrete. This can set the stage for damage control and joint corrective action.

NOTES:

**REFERENCE**

Fosmire, F.R., & Wallen, J.L. *S-T-P model*. Portland, OR: Northest Laboratory.
TYPICAL PROBLEMS IN RESPONDING TO THE PFI

Assumptions

All people make assumptions about the tasks with which they are confronted. In responding to the Process Facilitation Inventory, people make assumptions such as the following:

- They should not write outside the “boxes” (even though the instructions say this is acceptable);
- The process facilitator (PF) has or has not been working for very long with the client system (CS) group;
- The central issue(s) have or have not have been discussed by the PF and CS leaders and/or members prior to the scenario;
- The involved parties have or have not reached agreements about the central issue(s) in a scenario;
- Some critical activities have or have not occurred prior to the scenario.

A few people test the appropriateness and accuracy of their assumptions by checking with the instrument administrator or they simply give themselves legitimate permission to write their assumptions into their “Thoughts and Feelings” and/or, less often, into their “Words and Actions.” There is nothing in the instructions to say they cannot make and act on any assumptions they may choose. Most people fail to recognize that they are making any assumptions at all; they seem to assume that their assumptions are “truth.” Thus, they fail to recognize critical choice points and either move toward irrelevant or counterproductive goals or unnecessarily limit their intervention options.

Overcontrol

Some people approach process consultation as if it were a lesson plan for a training program. They may believe that it is proper for them to maintain (rather than share) control over the intervention by designing excessively structured interventions, characterized by long monologues covering many issues. This may be appropriate in training programs, where the trainer believes he or she knows what results the participants should achieve. It is not appropriate in process consultation, where the PF should be assisting CS leaders and members to determine where they want/need to go. Overdesigned interventions have no built-in “spaces” that allow the PF to obtain feedback or input from the CS members. Perhaps some consultants resist consideration
of unexpected issues that may emerge during the intervention—issues that could modify or redirect their interventions.

**Personal/Interpersonal vs. Systemic Approaches**

Most scenarios are ambiguous. This allows respondents to read into the situations those issues with which they are most familiar and comfortable. They may not identify optional ways of making sense out of the scenario, even when there are two distinct, alternative strategies. For example, some people may be more familiar and comfortable with a transactional (e.g., Reddy, 1994) approach than with a systemic (e.g., Schein, 1987, 1988) one. Thus, they focus on personal and interpersonal behaviors. However, these problematic behaviors may be symptoms of unexpected or discontinuous system dynamics rather than their causes (e.g., disturbances in the external environment to which the organization must adjust which, in turn, disrupts traditional practices and established relationships and precipitates the problematic interpersonal interactions). It may be argued that either strategy is likely to lead, eventually, to appropriate consideration of the other one. The critical questions are (a) Does the PF demonstrate any recognition that there are two alternative strategies?; (b) Does the PF consider the advantages and disadvantages of each alternative and make an explicit, informed choice?

**Avoidance of Central Issues**

Some respondents may refrain from conceptualizing the central issues implied by complex and emotionally intense scenarios. Instead, they may do nothing, feeling immobilized (which is not particularly useful unless the PF states that he or she feels immobilized) or patiently waiting for the situation to clarify itself (which is acceptable only if the CS team is not in a time crunch or a crisis). Or the PF may ask CS team members to perform the conceptualizing task by “stop-action,” during which the PF asks them to focus on (a) their understandings of the issues with which they are dealing (e.g., “I’m confused; can you help me to understand what is going on here?”) and (b) what they are trying/need to accomplish.

**Lack of Goals**

Some people do not identify the goal(s) of their interventions (what they intend to help their CS leaders and members to accomplish) in their “Thoughts and Feelings” responses. This often correlates with an absence of a plan or structure for a process intervention.

**Lack of Attention to Silent Members**

Some people focus on “which CS members said what” while ignoring the potential significance of the fact that other CS members or leaders said nothing. It may be a major error to allow some CS members to remain silent. They may be introverts who have
given up trying to compete for air time. In such cases, the PF must strive to help the CS group to create a level playing field, to enable the team to recognize and make use of all members’ resources. Alternatively, silent CS members may have competing goals, information, opinions, priorities, beliefs, preferences, etc., but be withholding these for unknown reasons (e.g., a norm of conflict-avoidance or a desire to let their competitors make embarrassing mistakes and “crash and burn”). Their input could be critical to the team’s effectiveness. PFs must determine why silent CS members remain silent, especially when the situation is critical.

**Failure to Complete Words and Actions Step**

Some people put a lot of effort into describing their “Thoughts and Feelings” but fail to convert this into their “Words and Actions.”

**Consideration of Group Behavior Rather Than Group Processes**

Some people tend to intervene at the personal, interpersonal, or group levels when counterproductive behavior at these levels is obvious. This may be precipitous. PFs may be more accurate and effective in considering whether the counterproductive behavior is a side effect of the CS group’s failure to employ effective, participatory problem-solving or decision-making processes in dealing with its critical issues. Although intervening at either level could make sense, the critical-intervention issue is whether PFs recognize that there are two alternatives from which they must choose and that there are potential advantages and disadvantages in choosing either.

**Failure to Deal with Either Process or Task**

Some respondents ignore expressions of strong feelings. Others focus on CS members’ strong negative feelings; their interventions are aimed at reducing this intensity or on converting “negative” to “positive” feelings. Others acknowledge and try to mobilize the energy of these feelings in an effort to identify and deal with the group’s tasks (created by the systemic events or conditions that “trigger” the feelings). The critical intervention issue is that to focus exclusively on the feelings may induce the PF to collude with the group to “flee into process” (so as to avoid a threatening task). On the other hand, to focus exclusively on the task may lead to “flight into task” (to avoid working on threatening, potentially explosive, or overwhelming feelings). A balanced intervention that embraces both task and feelings is ideal. PFs must recognize that they are choosing between optional intervention strategies, each of which has its own advantages and disadvantages.

**Failure to Identify Strategy**

During the debriefing sessions, many participants attempt to justify the absence of an explicit statement of the strategy behind their described interventions. They say they had certain (highly professional, highly desirable) intended actions in mind when they
described their “Thoughts and Feelings” and “Words and Actions” but they assumed it was unnecessary to say what these were. Many people do not recognize when they make and act on such untested assumptions.

**Difficulty in Responding to the Format**

Respondents who are unfamiliar with the scenario-based “Thoughts and Feelings-Words and Actions” format say they have difficulty shifting from theoretical or case-study methods for exhibiting their diagnostic-intervention competencies.

**REFERENCES**

