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Assessment Instruments for the Global Workforce

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INTRODUCTION

Spurred by the demands of globalization, international relocation, and the increasingly multicultural workplace, intercultural assessment instruments have proliferated in the last decade. The growing supply of instruments reflects the increasing importance of selecting appropriate people for international assignments or positions in multicultural work environments and preparing them for these unfamiliar circumstances. Because such positions often require competencies beyond the standard set of professional knowledge and skills needed for familiar first-culture work environments, international human resource professionals responsible for selection and development seeks tools to assess and enhance aptitude, awareness, and skills.

Now, early in 2007, there are dozens of commercially available and increasingly sophisticated instruments purporting to measure various aspects of intercultural adaptability or suitability; intercultural sensitivity, development, or competence; or work style and/or cultural values orientation. It has become increasingly difficult to keep up with what tools are available in the market, what they measure, and whether they are appropriate for particular needs.

This paper summarizes various aspects of competence required for successful performance in the global environment, organizes commercially-available instruments which attempt to measure some aspects of that competence according to their appropriate application – selection or development – and describes several appropriate instruments in each category with respect to purpose and design, supporting research, presentation languages, source, and other pertinent or unique attributes. Part 1 focuses on instruments particularly applicable to the selection process.

Part 2 focuses on instruments primarily designed for the development process.

In total 18 tools are included, originating in the U.S.A. (10), United Kingdom (3), Netherlands (3), Canada (1), and the United Arab Emirates (1). All instruments discussed are summarized in an attached table for quick reference.

Global Intercultural Competence: a Cluster of Traits, Attitudes, Knowledge, and Skills

Although a lot of research has examined the traits and skills associated with success in international assignments and, more recently, success in the multicultural workplace whether domestic or abroad, the selection and development process is still more of an art than a science. With respect to international assignments, there are so many variables affecting the outcome that predictability of success or failure is difficult. One must look at the personal situation of the candidate – single or married, with or without children, of what ages, separation issues with respect to extended family or support group, point in career path, etc. Variables in the assignment itself include location – developed or undeveloped economy, urban versus rural setting, remoteness, degree of cultural difference and language challenge, climate, number of other expatriates at the workplace and in the community, experience of the local workforce with foreigners, etc. – and the nature of the work – a technical versus a management focus, the relative importance of external relationship-building with client, customer, local government, and community versus internal management, and more.

So, there are many variables affecting the nature and the degree of challenge of an assignment. The fundamental question is: what



factors, beyond technical competence, predict success in the global business environment? *In general, the global workplace requires the ability to operate comfortably and effectively within a broad spectrum of difference – human, cultural, and environmental*, all of which overlap naturally. While research has identified numerous attitudes, traits, and skills that make up this broad ability or competence, here is a short and reasonably comprehensive list:

1. Action orientation (conscientiousness)
2. Flexibility
3. Emotional stability
4. Openness (open-mindedness)
5. Sociability (extraversion, agreeableness)
6. Cultural empathy (cultural sensitivity, cultural intelligence)

Taken as universal across cultures, the first “big five” attributes listed above (terminology sometimes varies) are transparent and make common sense with respect to fostering comfort and competence in unfamiliar and diverse situations. Such traits are generally not learned but rather part of one’s personality, their presence or absence appearing early in life. Although traits are generally considered stable rather than trainable competencies, the latter, more social dimensions have been shown to increase as a result of training or living abroad. For convenience, let us associate the “big five” cluster with *adaptability*.

Cultural empathy, however, differs from the others. As noted by Milton Bennett, empathy requires a shift in frame of reference, an experiencing of a situation from another person’s perspective.ⁱ Research in social neuroscience, as reviewed recently by Daniel Goleman, confirms ever more strongly that empathy, the major component of cultural sensitivity, is learned and that cultural sensitivity

plays a primary role in intercultural competenceⁱⁱ. We will associate this factor with *competence*.

The successful global manager, whether expatriating, simply working in a multicultural environment, or supporting a multicultural workforce, exhibits a complex *global competence* that comprises the following:

1. Knowledge of one’s own and other pertinent cultures
2. Recognition of specific differences between cultures
3. Understanding of how culture influences behavior in the workplace
4. Ability to empathize with, adapt to, and/or manage differences, as expressed in business structures, systems, and priorities, within multicultural work environments

Together with the factors discussed above, this emotional, cognitive, and behavioral set provides the foundation for successful participation in global business.

Tools for Building the Global Workforce

Whether the task is selecting employees to fill sensitive positions or development planning for managers, there are sophisticated and well-researched tools for measuring and developing various aspects of intercultural competence. It is crucial to understand the attitudes, knowledge, and skills needed for management of the global workplace and to be able to measure and develop these. The instruments discussed below a strong and consistent basis for these processes.

The somewhat artificial separation of *adaptability* and *competence* above allows us to group the nine instruments of Part 1 into two sections.



PART 1: TOOLS FOR THE SELECTION PROCESS

Adaptability Tools

When selecting candidates for international or multicultural assignments from a pool of personnel of roughly equal technical qualifications, it is useful to assess both intercultural adaptability and intercultural competence. Ideally, candidates are offered the confidential opportunity to complete instruments relating to both categories in order to self-select into or out of consideration for a specific assignment. There are numerous instruments designed to assess adaptability or intercultural competence, or some combination of both. We will first look at adaptability instruments.

Adaptability instruments were the first assessment tools developed in response to the globalization of business and the increase of international assignments. Some have been available for more than 30 years, and new ones continue to be developed. Most of these instruments are based primarily on a self-assessment of a set of personality traits (listed above under Global Competencies for Global Work) associated with adaptability to new situations.

Note that Human Resources personnel often elect to review the individual profiles resulting from these instruments. This can compromise the results, since in many cases the questions are quite transparent in terms of what the desirable answers might be. Thus, if a candidate suspects that his or her profile as revealed by the instrument might be a factor in an employment decision, he or she may not answer the questions candidly.

Questions focusing on adaptability traits generally employ five- or six-point Likert scales expressing degrees of agreement or disagreement. Typical questions, taken from several of the instruments described below, include:

- I can think of very few people who dislike me.
- I try to understand people's thoughts and feelings when I talk to them.
- My closest friends are similar to me in terms of their religious affiliations.
- I like to get the opinions of others when making decisions at work.
- I could live anywhere and enjoy life.
- I generally eat my meals at the same time each day.
- When I meet people who are different from me, I tend to feel judgmental about their differences.
- I can laugh at myself and not take myself too seriously.
- Most of what I do is governed by the demands of others.

Recognizing the transparency of such questions, it is advisable to use these tools for self-selection prior to offering international assignments.

Note also that use of such instruments in employment decisions can entail legal liability, since the tools are generally not job-specific. That is, if the candidate's profile from an instrument influences the hiring decision and the candidate is unhappy with the decision, he or she may have legal recourse in protesting that the instrument was irrelevant to the job and thus used inappropriately. This can work both ways, in rejecting an employee for a desired position or in selecting an employee for an assignment which results in failure. Instruments designed to assist the management decision process are so noted.



Here are six quite different instruments that assess variations of these traits or these plus other competencies. Four of these tools below were developed in the U.S.A., one in Canada and one in the Netherlands. Tools developed outside the USA are marked. Throughout the paper instruments are ordered alphabetically by acronym to avoid any implication of ranking:

- Cross-Cultural Adaptability Inventory (CCAI)
- International Assignment Profile (IAP)
- International Personnel Assessment tool (iPASS) *Canada*
- Overseas Assignment Inventory (OAI)
- Multicultural Personality Questionnaire (MPQ) *Netherlands*
- Self-Assessment for Global Endeavors (SAGE)

Cross-Cultural Adaptability Inventory (CCAI)

The CCAI, developed by Colleen Kelley, Ph.D. and Judith Meyers, PsyD, was copyrighted in 1987. It is designed to provide information to an individual about his or her potential for cross-cultural effectiveness. It consists of 50 questions that assess four components of cross-cultural adaptability - emotional resilience, flexibility/openness, perceptual acuity, and personal autonomy. Initial statistical studies indicated that the CCAI had sufficient reliability and validity for a training instrument. While some recent research has questioned the validity of the four-factor structure, other research has correlated it with emotional intelligence. The CCAI remains a convenient tool for the self-selection process because of its simplicity and low cost. The instrument can be purchased in any quantity and does not require certified administrators. It can be used as a stand-alone instrument for self-selection for international assignments, as part of a larger selection battery, for pre and post testing or as part of a

cross-cultural training. There is a follow-up training tool called the CCAI Action-Planning Guide that suggests actions to address factors assessed as weak and there is also a Facilitator's Guide and Cultural Passport to Anywhere for use in group debriefs. The Multi-Rater Kit provides 360-degree feedback with three observers. The CCAI is available in two versions, a self-scoring paper & pencil instrument that provides immediate turn-around, and an online version that provides the scoring and a printed feedback report, from Pearson Performance Solutions at 1-800-922-7343 or www.pearsonps.com under Solutions/Performance Management/Organization Surveys/CCAI.

International Assignment Profile (IAP)

It is common knowledge that family adjustment is the most significant threat to the success of an international assignment. The IAP, from International Assignment Profile Systems, is a unique and technologically sophisticated tool designed primarily as a preparation instrument to assist those selected for international assignment to prepare well for their destination. Its goal is to make a good match between the employee, the family, and the particular destination. However, the tool has selection implications; if the IAP report indicates that the required support is too onerous or extensive, then manager and employee may want to reconsider the timing or destination. The IAP is a multi-faceted process that gathers and organizes extensive information about a family anticipating international assignment and integrates it with information about the destination to which they are being sent. It also provides the means of archiving this information for learning and future research. The IAP recognizes the client company, and can be customized to convey specific information; it can



be modified, customized, or “branded” to fit a client’s or vendor’s specific requirements.

The IAP Report summarizes family information in a comprehensive, easily understood format identifying core issues which need to be addressed prior to departure, such as

- Critical planning issues and adjustments that must occur to insure assignment success
- A list of “sleeper” issues that could emerge post-arrival to compromise the assignment
- Information on “back home” issues that may impact the assignment
- “Pleasant surprises” – essential or important things to the family that will meet or exceed expectations in the destination
- Destination information on spousal employment and spousal impact
- Traits and behaviors that may hinder or enhance cultural adjustment

The two-part questionnaire can be completed in approximately 35 minutes per section for employee and spouse. The survey is secure and does not have to be completed in one sitting. The report is typically generated within 24 hours, but can be received more quickly if necessary. While information on how to use and interpret the IAP is available from IAP Systems, the IAP requires no special training. (No information on research support was offered.) More information is available from www.iapsystems.com .

International Personnel Assessment Tool. (iPASS)

With Part 2 still under development, iPASS is already a comprehensive behaviorally-based tool to assess intercultural effectiveness and readiness for undertaking an international assignment. Designed for HR and recruiting

specialists in the international field, iPASS is being developed by the Centre for Intercultural Learning, Foreign Affairs department, Canada.

In contrast to most intercultural assessment instruments, iPASS is intended to provide a strong, reliable basis for HR and management in employment decisions. Part 1, available now in French and English, is the Behavioral-Based Interview Kit, providing a reliable intercultural competency interview. Based on 35+ years of research, the interview kit employs seven Competencies for Intercultural Effectiveness: cultural adaptation, knowledge of the host country, sensitivity and respect, network and relationship building, intercultural communication, intercultural leadership, and personal and professional commitment. Each competency has four levels of mastery. A client chooses three competencies necessary for success in the intended assignment as well as the level of each competency required for adequate functioning. Based on this, a customized interview kit is then prepared for the iPASS-certified HR/recruiter specialist with a set of comprehensive questions for a 2-hour interview appropriate to the selected competencies and levels and including questions on motivation, interest, and attitude toward cultural difference as well.

Part 2, a 40-question Situational Judgment test based on actual intercultural conflict situations, will provide an additional screening tool when completed. Qualification for use of the Behavioral-Based Interview Kit is obtained through a 3-day training delivered for 8 – 12 people wherever required. For further information, go to <http://www.dfait-maeci.gc.ca/cfsi-icse/cil-cai/iPass-en.asp?lvl=6> or contact the project leader, Nicole Paulun at nicole.paulun@international.gc.ca (access from www.intercultures.gc.ca)



Multicultural Personality Questionnaire (MPQ)

Karen I. Van der Zee, Ph.D. and Jan Pieter Van Oudenhoven, Ph.D. University of Groningen, the Netherlands developed the Multicultural Personality Questionnaire of 91 items as a multidimensional instrument to measure intercultural effectiveness. Developed in 1998 and revised in 2000, the MPQ measures five traits: cultural empathy, open-mindedness, social initiative, emotional stability, and flexibility. Designed primarily for self-assessment, it can be used as well for risk assessment as part of the selection process. More information on the MPQ can be found at www.interculturalcontact.org or www.intercultureelcontact.nl/en/. The Questionnaire is available through Van der Maesen Personnel Management in Dutch, English, German, Italian (all research-supported), and French online at www.psychecommerce.nl; a report is generated and available immediately for download.

Overseas Assignment Inventory (OAI)

Developed by Michael Tucker, Tucker International, the OAI was the first major instrument assessing suitability for an international assignment. Available since the early 1970s and first designed for the U.S. Navy, the self-awareness questionnaire examines six factors of acceptance, knowledge, affect, lifestyle, interaction, and communication found crucial for successful adaptation to another culture. The factors include fourteen specific motivations, expectations, attributes, and attitudes, including motivations for accepting or wanting an international assignment. Studies of validity and reliability have been conducted at intervals on various populations since its implementation, and the OAI has undergone significant redevelopment. It continues to be

well-known and respected in the relocation industry.

The questionnaire is available in booklet form or online, although the reports, in two versions, one to the candidate and another to HR or management, are furnished in hard copy only and may take several weeks for delivery.ⁱⁱⁱ Reports are self-explanatory and do not require certified administrators. However, for the corporate selection process the OAI can be combined with a behavioral interview; in this case HR must be certified in the interview technique incorporating the OAI report. The OAI report can be integrated into intercultural training as well. Use of the OAI can be arranged through Tucker International www.tuckerintl.com in English, French, and German. Tucker International also offers several other assessment instruments. The OAI is appropriate for self-selection and may be helpful for HR in its decision process. The OAI provides a limited basis for professional development in preparation for an international assignment, and its debrief can become a major component of cultural training.

Self-Assessment for Global Endeavors (The SAGE)

The SAGE was developed by Paula Caligiuri, Ph.D., Director of the Center for Human Resource Strategy at Rutgers University at the time of writing. Available since 1997, the instrument was designed to assist individuals and families as a confidential tool in their decision process of whether to accept an international assignment. The tool's three sections address issues of personality (6 factors), motivation, and family situation. Validity and reliability is supported by considerable research. The SAGE is available in two versions – one for the employee and a second for the accompanying partner - on line in English



with the report immediately available for reading on line or printing. Paper-based versions are also available in French, Japanese, Mandarin, and Taiwanese. These versions are not merely translation/back translations, but recreations of the instrument using cultural resources to assure the appropriateness of the questions. The first two sections, on traits and motivation, are scored with ranges marked in green, yellow, or red as indications of one's suitability and readiness for assignment. The third section, on family, is not scored but is designed to facilitate the family conversation necessary for an informed decision about seeking and accepting an assignment. While designed to support the self-selection process, the SAGE report can also be within a pre-departure or post-arrival cultural training program. Information on The SAGE is available at www.caligiuri.com ; the tool can be purchased from RW³ LLC, 212-691-8900, or www.rw-3llc.com.

Competence Tools

While the dividing line between adaptability and competency instruments is blurry because many incorporate aspects of both, such as the OAI and iPASS above, there are a number of tools designed more for the assessment of competencies than for adaptability. The next three disparate instruments focus more on the complex skills essential for effective functioning in international assignments. Proprietary considerations prevent the presentation of sample questions and, in any case, because of the complexity of these tools the presentation of a few sample questions would not be illustrative and might be misleading .

- Global Candidate Assessment (GCA 360°)

- Intercultural Development Inventory (IDI)
- Survey on Intercultural (Relocation) Adaptability (SIA, SIRA)

Global Candidate AssessmentSM (GCA 360°)

The Global Candidate Assessment is an elaborate 3-step online assessment process developed by Aperian Global that involves self-assessment and assessment by up to 10 colleagues, supervisors, and subordinates on the same items (not identified in the available description), including written commentary on selected questions about the candidate's attitudes and abilities. While the assessment examines work-place behaviors and adaptability, the instrument does not focus specifically on intercultural competencies as defined above. Once the surveys are completed, the tool generates an instant compilation, the Candidate Summary Report, which is viewable by the client assessment administrator. This includes overall scores, a combined visual display, a gap analysis indicating difference between the candidate's and others' scores, and a compilation of written comments. Administrative functions can be performed by Aperian or by a client HR person. Step Two is a 3-hour interview with the candidate conducted by an Aperian consultant. This may include the spouse or partner as well and covers motivation, challenges, relocation issues, career impact, personal strengths/ weaknesses, and self-rating of adaptability, all resulting in a verbal summary report to client HR. Step Three is a candidate meeting with client HR to debrief the process and indicate current level of commitment to an international assignment. As an optional Step 4 after the candidate has been accepted, the candidate and key colleagues in the new position can take the GlobeSmart Assessment Profile (GAP), which compares a profile of the candidate with that of the selected colleagues



and generates a report to each suggesting various behavior modifications to enhance collaboration. *Clearly the GCA 360° is designed to support employment decisions.* (No information on research support was offered.) More information on the Global Candidate Assessment is available from <http://www.aperianglobal.com/>, which also offers a number of other web-based tools.

Intercultural Development Inventory™ (IDI)

The IDI is a theory-based instrument developed by Mitchell Hammer, Ph.D., and Milton Bennett, Ph.D., that measures intercultural sensitivity as conceptualized in Bennett's Development Model of Intercultural Sensitivity (DMIS - 1986, 1993). First introduced in 1997 and revised in 2002, the 50-item instrument measures people's reaction to cultural difference along a developmental six-stage scale of cognitive structures or "worldviews" reflecting increasing intercultural sensitivity or competence. These worldviews range from denial and defense through minimization to acceptance, adaptation and integration, with the first three labeled as ethnocentric and the last three, ethno-relative. Intercultural competence minimally requires development into the acceptance/adaptation stage of intercultural sensitivity. The IDI is supported by impressive reliability and validity studies, available from <http://www.intercultural.org/>, and *can be used with confidence in both the selection process and developmental planning*, where it predicts the kind of intervention most effective for development according to the revealed stage of intercultural sensitivity. It is equally applicable for measuring the intercultural competence of work or leadership teams (as an average) and for planning further competence development.

The IDI is available as a paper & pencil instrument or online in twelve languages:

Bahasa Indonesia/Malay, Chinese, English, French, German, Italian, Japanese, Korean, Norwegian, Portuguese, Russian, and Spanish. While inexpensive to purchase, it must be purchased and debriefed by a certified interpreter. Further information is available at www.intercultural.org.

Survey on Intercultural (Relocation) Adaptability (SIA & SIRA)

From Grovewell LLC, SIA and SIRA are online 360° assessment instruments for global leadership or relocation candidates. For global leadership candidates, the SIA assesses seven skills/qualities that facilitate successful adaptation to global realities: flexibility, non-judgmentalness, interest in different views and values, awareness of others' feelings, attention to relationships, responding well in unclear situations, and self-confidence. The 360° process (up to twelve raters) also assesses twenty behaviors that undermine relationships with diverse counterparts. For global relocation candidates, the SIRA adds a self-assessment (not 360°) for candidate and separately for the spouse or partner of motivations, concerns, and expectations around long-term living and working in an unfamiliar environment. The *Feedback Report* of these instruments is provided directly and solely to the user, who is advised to share results with HR or management. While no certification is required for the administration of these instruments, a separate manual plus phone consultation is provided to HR and EAP professionals in contracting firms. Usage prices are available on the website at <http://www.grovewell.com/expat-360-assessment.html>.



Conclusion: Part 1

Part 1 describes nine varied instruments in support of the selection process for international assignments or entry into the multicultural workplace, with respect to both adaptability and to intercultural competence. These were selected from a larger pool for various reasons including design, research support, commercial availability, and application to varied needs. As a final comment, users of selection instruments are often concerned about their reliability and validity, often because of a desire to use the tool to predict performance success and thus tie it to employment decisions. It is important to understand that, although many of these instruments are well supported by significant research, the linking of their results to the probability of assignment success is problematic since such instruments (with the exception of iPASS and GCA 360°), are not job-specific in their design. That is, the need for adaptability and intercultural competence varies greatly with the job and the work and living environments. Therefore, results of these instruments (again with the exception of iPASS, GCA 360° and, to some extent, the IDI) should not be used as the sole or even the primary basis of employment decisions.

Part 2 (next page) describes another set of instruments primarily suited for the development of intercultural competence.



PART 2: TOOLS FOR THE DEVELOPMENT PROCESS

Intercultural Awareness Tools

Inspired by intercultural research from Florence Kluckhohn & Fred Strodtbeck in the 1950s through Edward Hall in the 60s and 70s, Geert Hofstede and Fons Trompenaars (with Charles Hampden-Turner) in the 80s and 90s, plus the large value surveys such as the World Values Survey, Shalom Schwartz's work in Europe, and most recently the seminal publication of *Culture, Leadership, and Organizations: The GLOBE Study of 62 Societies*^{iv}, the contrast of cultures through the lens of value dimensions has provided a research-supported, practical means of comparison in which values can be predictably linked to patterns of behavior in a variety of situations. Such information forms the basis of the knowledge component of intercultural competence, and can be invaluable in the preparation for an international assignment, for working in a multicultural environment, or for leading a global team. It is no surprise, then, that a number of assessment instruments have been developed to enable people to understand their own cultural value preferences and compare these with core values of other cultures in order to understand the challenges these differences might present in the work environment.

Since each of the following instruments focuses on value preferences, a list of sample questions will provide an idea of how these tools are designed; because of their proprietary nature, the tools from which the questions are drawn are not identified:

- You take more pride in...
 - Your contributions to your company

- The accomplishments of your company
- Outperforming co-workers is a motivator for you.
 - Yes
 - No
- It is more important that business decisions be made in accordance with...
 - General principles and theories
 - The particular circumstances
- Most organizations would be better off if conflict could be eliminated forever. (5-point Likert scale of disagreement/agreement)
- In order to have efficient work relationships, it is often necessary to bypass the hierarchical lines. . (5-point Likert scale)
- Gaining consensus is more important than decisive action. (5-point Likert scale)

Below are descriptions of six instruments (one each from the United Kingdom, the United Arab Emirates, and the Netherlands) with a focus on cultural values and their impact on how we work. These tools are not evaluative and are not designed to support employment decisions by candidates or management.

- Argonaut Assessment (AA) *U.K.*
- Cultural Mapping and Navigation© Assessment Tool (CMNAT) *U.A.E.*
- Cultural Orientation Indicator (COI)
- Culture in the Workplace Questionnaire (CWQ)
- Intercultural Awareness Profiler (IAP) *Netherlands*
- Peterson Cultural Style Indicator (PCSI)



Argonaut™

Developed by Coghill & Beery International in the United Kingdom, ArgonautOnline™ is a suite of cross-cultural e-learning tools that includes an assessment instrument. The Argonaut Assessment (AA) instrument, available in English only, employs a 20-minute questionnaire involving twelve dimensions (communication, conflict, problem solving, space, use of time, time spans, fate, rules, power, responsibility, group membership, tasks) to produce a graphical map allowing comparison of the learner's self perception, home culture, and target cultures from a list of 50+ countries. This contrastive mapping provides a basis for the formation of "personal strategies for international success." Results from the AA instrument can be combined with other online learning tools including personalized feed back and interactive tutorials. Access to the AA is gained through accreditation as a trainer or coach to use the ArgonautOnline tool suite. For more information: <http://www.argonautonline.com/>

Cultural Mapping and Navigation© Assessment Tool (CMNAT)

Created by KnowledgeWorkx in the United Arab Emirates, this tool employs a 72-question online inventory to produce a personal profile which details preferences on 12 bi-polar cultural dimensions impacting workplace behaviors: growth (people vs. material), relationship (universal vs. situational), outlook (tradition vs. innovation), destiny (directed vs. directive), context (informal vs. formal), connecting (exclusive vs. inclusive), expression (reveal vs. conceal), decision making (relationship vs. rules), planning (people vs. time), communication (direct vs. indirect), accountability (community vs. individual), and status (ascribed vs. achieved). The CMNAT profile is incorporated in the second level of a four-level program (three days of training for

Levels 1 – 3 and ongoing coaching toward intercultural excellence in Level 4). The goal is the growth and application of intercultural intelligence to achieve intercultural excellence within multicultural teams. The Assessment Tool is also integrated with other (non-cultural) assessment instruments (the Diamond Profiling Process) as part of intercultural leadership consultation. There is a five-day intensive program for certification in the delivery of Levels 1 – 3 of the Cultural Mapping & Navigation Program© suite of products. More information is available at www.KnowledgeWorkx.com.

Cultural Orientations Indicator® (COI)

The COI is a web-based self-reporting instrument developed by TMC (Training Management Corporation) that assesses individual preference within ten cultural dimensions (environment, time, action, communication, space, power, individualism, competitiveness, structure, thinking) drawn from the social science research mentioned at the beginning of Part 2 plus other contributors, such as Edward Stuart, Milton Bennett, and Stephen Rhinesmith. The 108-question inventory yields a profile of preferences along a series of continua - seventeen in all, as several of the ten dimensions have sub-continua. The profile of preferences (restricted to work-related behaviors and situations) enables comparison to other team members and national norms, allowing "gap analysis" and the coaching of strategies for bridging differences. Group or team aggregate reports are also available. The COI is also integrated into the Cultural Navigator™, an online learning portal, and other programs offered by TMC. Test construction has been psychometrically validated (but not all the ten dimensions have been validated globally). The COI is available in Chinese, English, French, German, Italian, Japanese, and Spanish. The COI is supported by the *Cultural Orientations Guide* (4th edition), which supplies a context for



understanding the instrument and its applications. Further information is available at <http://www.tmc corp.com/>.

Culture in the Workplace Questionnaire™ (CWQ)

Based on the research and developed with the support of Geert Hofstede^v, the CWQ, recently revised and web-enabled, provides individual cultural profiles incorporating five cultural dimensions validated by extensive research: individualism, power distance, certainty (uncertainty avoidance), achievement (masculinity), and time orientation (long-term orientation). The instrument is available through ITAP International, which licenses the Culture in the Workplace Questionnaire™ from Professor Hofstede. Profiles can be compared to average national values (established through the research of Hofstede and others) of 60 countries.

The 60-question inventory is completed online, resulting in a 7-page personal report, which can be downloaded and printed by the user or saved for later distribution by a facilitator. The individual profile illustrates the user's score on each dimension in comparison with national averages of up to 15 selected countries. The report explains each dimension, lists the impact on work style of values at either end of the dimension, such as individual vs. group orientation, and illustrates in a scenario the misunderstanding and conflict typical of interaction between individuals holding different orientations. It also provides specific analyses on the user's score on each dimension and the implications of the differences between the user scores and the comparison country averages and adaptive recommendations.

The CWQ can be used with individuals or groups and also provides team reports for printing or download. Group averages can be

compared in PowerPoint slides to numerous countries' average values, and the scores of individual members of the group can be confidentially compared with respect to each dimension, which is very useful for global teams. The CW Questionnaire is currently available in a simple world business English; by the end of 2007 it will be available in multiple languages. Clients can also add special demographic fields so that, for example, data can be analyzed by location of multiple users.

CWQ profiles must be requested and debriefed by trainers or consultants certified in CW profile interpretation. More information on the CWQ is available from <http://www.itapintl.com/>

Intercultural Awareness Profiler (IAP)

Created by Fons Trompenaars, the IAP employs Trompenaars' seven cultural dimensions or polarities, a list drawn from sociological theories of the 1950's and 60's: universalism vs. particularism, individualism vs. communitarianism, specific vs. diffuse cultures, affective vs. neutral, achievement vs. ascription, sequential vs. synchronic, internal vs. external control. A diagnostic questionnaire, available online, is used to produce a personal cross-cultural orientation against a reference model. Further questions provide sub-group identifications of organizational culture, functional areas, and other variables. The analysis is cross-referenced against the Trompenaars' cross-cultural database including the data of 55,000+ managers in many countries gathered over a 10-year period. The personal report offers advice for doing business and managing in and with other cultures. For information on using the IAP, contact Trompenaars Hampden-Turner (THT) Consulting at <http://www.thtconsulting.com/>.



Peterson Cultural Style Indicator™ (PCSI)

The PCSI, designed by Brooks Peterson of Across Cultures, Inc. consists of a 20-question online inventory that generates a 5-dimensional profile. The five bi-polar dimensions are hierarchy/equality, direct/indirect, individuality/group, task/relationship, and risk/caution. One's profile is comparable to 70 country "norms" (chosen scores based on comparing various studies and updated in 2004), with strategic recommendations for increasing business success. Research supporting the instrument is discussed on the website, which includes a list of corporate clients. The PCSI, designed as a stand-alone instrument, can be accessed immediately on line for \$50 per use, including the comparison of your profile with other countries and suggestions for bridging gaps based on your score. For more information, go to <http://www.acrosscultures.com/>

Intercultural Coaching Tools

One of the tools introduced in Part 1 above, Tools for the Selection Process: Competence, the *Intercultural Development Inventory*, is equally suitable for the development process, particularly in a coaching environment. The explanatory material provided in an IDI profile contains descriptions for each of its scales, including behaviors or attitudes associated with particular scores, the strengths associated with these, and the developmental tasks. With the help of an intercultural coach, a user can create and implement a developmental plan.

Here are three more instruments, two developed in the United Kingdom and one in the Netherlands, all intended to be used developmentally. The first of these instruments focuses on competencies, the second incorporates cultural values and an overlay of

workplace behaviors, while the third focuses on adaptability and workplace behaviors. Again, proprietary considerations prevent the presentation of sample questions, and, because of the complexity of these tools, a few sample questions would not be illustrative and might be misleading.

- Intercultural Readiness Check (IRC) *Netherlands*
- The Spony Profiling Model (SPM) *U.K.*
- The International Profiler (TIP) *U.K.*

Intercultural Readiness Check (IRC)

The intercultural readiness check was developed in 2002 by Ursula Brinkman, Ph.D., of Intercultural Business Improvement in the Netherlands. Focused entirely on learnable complex skills crucial to effective intercultural interaction, the IRC examines the following four competencies: intercultural sensitivity, intercultural communication, building commitment, and preference for certainty (defined as "ability to manage the greater uncertainty of intercultural situations"). The tool can be used before entering a multicultural environment or during an international assignment. In the debrief of the personal profile, a participant is advised of potential pitfalls and provided practical suggestions for development. The participant can then create, in collaboration with an intercultural trainer or coach, a plan for applying strengths and developing weak points, which can be carried out with or without continued coaching. Reliability and validity research was conducted on an international business population of Europeans, U.S. Americans, and others. Studies show high reliability (reconfirmed based on a population of more than 2600 individuals) and sufficient validity to make the IRC a useful instrument for specific developmental training on any of the four competencies. Research continues on the instrument and scores can be compared to a large data bank of more than



7,000 respondents. The questionnaire can be accessed online, but results must be presented by a licensed intercultural consultant. (Paper-based versions are available in Czech, Dutch, French, German, and Japanese.) Information concerning use of the IRC and certification is available from www.ibinet.nl and www.irc-center.com

The Spony Profiling Model (SPM)

The SPM is a unique integrated online instrument offered by FutureToBe in the United Kingdom that combines aspects of cultural values and work style instruments with 360° reporting on communication style (three work colleagues). It can be used to produce individual, team, and organizational culture profiles using the same concepts and frameworks, thereby providing consistency, rigor, and integration between the development of individuals, the building of teams, and the strategic alignment of organizations. Developed over eight years of research and testing in Britain and France by Dr. Gilles Spony at the Cranfield School of Management, the SPM incorporates the work of cross-cultural psychologist Shalom Schwartz as well as the research of Geert Hofstede to produce profiles of work style preferences. These are graphically displayed on a values framework of two perpendicular universal axes, the vertical RELATIONSHIP axis of Self-Enhancement vs. Consideration for Others and the horizontal TASK ORIENTATION axis of Group Dynamics vs. Individual Dynamics. This results in a profile of twelve attitudinal orientations which yield twelve operational styles with a total of 36 subdivisions. The individual profile is then overlaid on a cultural values map in order to understand how work style may fit into or clash with various national cultures. The 230 questions of the work style questionnaire require about 45 minutes, while the communication style questionnaire for colleagues takes about fifteen

minutes. Because of the SPM's sophistication and complexity, accreditation in its use requires a three-day training plus one day of assessment in order to use the instrument to a professional standard with respect to individuals, teams, and organizations. Candidates for accreditation are preferred to be holders of a Certificate of Competence in Occupational Testing (Level A) from the British Psychological Society and/or to have experience of other management models. More information on the SPM is available at www.futuretobe.net/.

The International Profiler (TIP)

TIP, developed by WorldWork Ltd. in the United Kingdom, is a web- or paper-based questionnaire and feedback process, available online in English, German, French, and Italian, to assess the development needs of managers and other professions for international work. It is based on a set of ten competencies with 22 associated skills, attitudes, and areas of knowledge derived from intercultural research and the practical experience of international professionals. The competencies are openness, flexibility, personal autonomy, emotional strength, perceptiveness, listening orientation, transparency, cultural knowledge, influencing, and synergy. TIP is an online psychometric inventory of 80 questions requiring about 45 minutes and generating a scored report within a hefty Feedback Book for the certified consultant and client that provides structured feedback in terms of the energy, emphasis and attention the user typically brings to a competency set. The feedback session, face-to-face or by telephone, consists of a structured discussion of the report with respect to the user's present or future international challenges. The intent is to identify three or four qualities requiring greater energy in the future. This results in a completion of a Personal Development Plan by the user entailing developmental areas, expected benefits from the development, and an action



plan. The licensing process, required in order to employ TIP, provides a Coaching Manual.

Global View 360°

WorldWork Ltd. also offers **Global View 360°**, a panoramic version of the TIP providing feedback from 6 – 10 international colleagues, clients, friends, etc. who have observed the user in international contexts. It employs a reduced questionnaire (55 questions) focusing solely on the 10 key competencies and provides a gap analysis in the feedback report of the difference between the level of importance given to selected behaviors as compared with the perceived level of performance. Two free fields allow for open-ended commentary. The Global View 360° can be administered in its entirety by its subject. For more information on both instruments, email info@worldwork.biz or go to www.worldwork.biz.

Coaching look at workplace behaviors, one from an adaptability and the other from a cultural values perspective. The third tool examines complex skills in the work environment. All these tools are most appropriate to a coaching process.

Conclusion: Part 2

The six value orientation tools described in Tools for the Development Process: Intercultural Awareness all incorporate the concept of behaviors (generally in a business context) differing rather predictably according to deeply held cultural preferences on values spectra that have been extensively researched globally over the last 50+ years. The instruments differ with respect to the value dimensions they employ, but they all produce personal profiles for comparison with other individuals and group or national averages. Such instruments can be powerful teaching tools for the knowledge component of intercultural competence, both before and during an assignment or while in a multicultural team; they provide structured comparative bases for intercultural training and can also be used for coaching.

Two of the instruments described in Tools for the Development Process: Intercultural



CONCLUSION

The increasing demands of globalization raise the stakes of cultural due diligence, both in the selection of appropriate personnel for sensitive positions in the multicultural workforce at home and abroad and in the preparation of employees for the intercultural demands of these assignments.

In making employment decisions with intercultural implications, no assessment instrument by itself can replace a thorough and systematic selection process including job-specific performance evaluation, interviews with candidates, colleagues, superiors, direct reports, and family (in the case of international assignments). On the other hand, with the availability of the instruments described above, it is equally inexcusable to make such decisions without the support of an appropriate intercultural assessment tool.

Whether you intend to

- Help an employee or family decide whether to accept an international assignment;

- Gather significant information for HR and management to assist in a culturally sensitive employment decision;
- Choose the most culturally competent manager from a pool of candidates to lead a virtual multicultural team;
- Determine the intercultural competence of a work group or leadership team;
- Prepare a manager for an international assignment or a multicultural leadership position;
- Prepare an individual or team for work with a specific cultural group;
- Coach an international transferee or the leader of a multicultural team;
- Provide developmental input to a multicultural team;

or impact any other situation involving a need to select for or further develop intercultural competence, there are competitive choices among the sophisticated and powerful assessment tools described in this paper to assist you in that task. I encourage you to investigate further those which seem most relevant to your needs.

ⁱ Milton J. Bennett, "Towards Ethnorelativism: A Developmental Model of Intercultural Sensitivity," in *Education for the Intercultural Experience*, Ed. R. Michael Paige, Intercultural Press, 1993, pp. 53-54.

ⁱⁱ Daniel Goleman, *Social Intelligence: The New Science of Human Relationships*, Random House, Inc., 2006.

ⁱⁱⁱ Information concerning commercially available instruments is based on what was readily available publicly at the time of writing. Because all these instruments are proprietary, full information on availability and cost may be provided solely to potential purchasers.

^{iv} *Culture, Leadership, and Organizations: The GLOBE Study of 62 Societies*, Ed. by House, Hanges, Javidan, Dorfman, & Gupta, Sage Publications, 2004.

^v Dr. Hofstede is Professor Emeritus, the University of Limburg at Maastricht, Director (Emeritus) of the Institute for Research on Intercultural Cooperation (IRIC), the Netherlands, and author of *Culture and Organizations: Software of the Mind*, McGraw Hill, 1991 and *Culture's Consequences: Comparing Values, Behaviors, Institutions, and Organizations across Nations*, which presents the research basis for the CWQ.



About the Author

DOUGLAS STUART, PH.D., Director of Intercultural Training, oversees IOR's training services worldwide and is responsible for the quality of both the curriculum and delivery of services. Doug has considerable expertise in assessment instruments for the global workforce and is certified to deliver a variety of tools, including the Intercultural Development Inventory, Culture in the Workplace Inventory, Global Teams Process Questionnaire, and The International Profiler. Doug also provides executive intercultural coaching and works closely with professionals from a broad array of industry sectors and nationalities. He is a frequent speaker on global talent management trends and issues and also publishes articles, most recently a chapter on intercultural assessment instruments in the 2009 SAGE publication, *Contemporary Leadership and Intercultural Competence: exploring the cross-cultural dynamics within organizations*. Prior to joining IOR, Dr. Stuart served as an educational specialist in Andersen Worldwide's Performance Consulting group at the Center for Professional Education. Dr. Stuart's background in international education includes full-time faculty positions in the Humanities Department at Illinois Institute of Technology in Chicago, Illinois, and the Economics Institute of the University of Colorado, Boulder, Colorado, as well as language training program management positions in Algeria and the United Arab Emirates. His international work experience also includes Germany, Egypt, and Vietnam. Dr. Stuart earned his doctoral degree in linguistics from the Illinois Institute of Technology in Chicago, Illinois and pursued post-graduate studies at the Illinois School of Professional Psychology in Chicago, and in transpersonal psychology at Naropa University in Boulder, CO. He is currently completing a Master Certification as a Developmental Coach/Consultant with the Interdevelopmental Institute.

<http://www.iorworld.com>

Assessment Instruments for the Global Workforce: I

Tools for the Selection Process: Intercultural Adaptability and Intercultural Competence
Compiled by Dr. Douglas Stuart, Training Manager: IOR Global Services

Category	INTERCULTURAL ADAPTABILITY					
Name	Cross-Cultural Adaptability Inventory (CCAI)	International Assignment Profile (IAP)	International Personnel Assessment Tool (iPASS)	Multicultural Personality Questionnaire (MPQ)	Overseas Assignment Inventory (OAI)	Self-Assessment for Global Endeavors (SAGE)
Non-US Origin			Canadian	Dutch		
Uses	Self-selection; most effective as part of training event	Family-focused self-selection; no training application	A part of management selection process; no training application*	Self-selection, most effective as part of training event or coaching prior to departure	Primarily self-selection & coaching; may be incorporated into interview procedure	Employee and spouse self-selection, but can be effectively incorporated into a training event
*Qualifies as factor in corporate employment decision						
Description	50-Items, 4 scales: emotional resilience, flexibility/openness, perceptual acuity, personal autonomy Web- or paper-based, self-scoring, brief self-contained interpretation	Two-part questionnaire that is taken by employee and spouse, which organizes information about the family and matches it with the chosen destination* Web-based; feedback to the respondents within 24 hours	In Part I, the Behavioral-Based Interview Kit, the client chooses 3 of 7 competencies for intercultural effectiveness and each has 4 levels of mastery; 2-hour interview. Part II is a 40-question situational judgment test. **	91-items, 5 traits: cultural empathy, open-mindedness, flexibility, emotional stability, social initiative Web-based self-assessment; downloadable report to user or to trainer/consultant for debrief with respondent	106 items, 14 scales: covers motivation, expectations, attitudes, attributes Paper or web-based; distinct reports mailed to user & HR When combined with behavioral interview, HR must be certified to conduct**	3 sections, 80+ questions, 6 traits - sociability, emotional stability, openness, autonomy, curiosity, flexibility, plus language, career & family issues Web-based; downloadable reports; separate versions for employee & spouse
*Modifiable **Requires certified assessor						
Validation	Normed in multicultural population	Not a research-based instrument; validation not necessary	Does not require statistical validation	Country-specific norm scores available from international testing; statistically validated in 4 of 5 languages	Used in 40 cultures, but not separately normed	Items rewritten (not simply translated) for several cultures; statistically validated
Languages	English	English	English	Dutch, English, French (not yet validated), German, and Italian online	English, French, German	English, French, Japanese, Mandarin, Taiwanese English only online
Source	Pearson/ Performance Solutions http://www.vanguard-hcm.com/Solutions/PerformanceManagement/OrganizationalSurveys/CCAI/	International Assignment Profile Systems http://lapsystems.com/	Centre for Intercultural Learning http://www.dfait-maect.gc.ca/cfsi-licse/cil-cal/iPass-en.asp?lvl=6	Psychecommerce http://www.psychecommerce.nl/pc/en/index.html	Tucker International http://www.tuckerintl.com/index.jsp	RW ³ LLC http://www.rw-3llc.com/

Assessment Instruments for the Global Workforce: II

Tools for the Development Process: Intercultural Awareness and Intercultural Coaching
Compiled by Dr. Douglas Stuart, Training Manager: IOR Global Services

Category	CULTURAL AWARENESS INSTRUMENTS					
Name	Argonaut™ (AA)	Cultural Mapping and Navigation System (CMNAT)	Cultural Orientation Indicator (COI)	Culture in the Workplace Inventory (CWQ)	Intercultural Awareness Profiler (IAP)	Peterson Cultural Style Indicator (PCSI)
Non-US Origin	British	U.A.E.			Dutch	
Uses	Assesses cultural value preferences with comparison to national averages	Assesses cultural value preferences; no reference to national averages; used primarily with teams	Assesses cultural value preferences with comparison to national averages Stand-alone tool, but can be incorporated into a individual or group training	Assesses cultural value preferences with comparison to researched national averages Stand-alone tool, but can be incorporated into individual or group training	Assesses cultural value preferences with comparison to national averages Stand-alone tool, but can be incorporated into individual or group training	Assesses cultural value preferences with comparison to national averages Stand alone tool, but can be incorporated into a training event
Description	Web-based, e-learning tool; personalized feed back and tutorial tools are offered** 20-minute questionnaire with 12 dimensions, results are generated in a graphical map comparing the candidate with selected country	Web-based; downloadable graphic profile and interpretation** 72-questions produce a profile with 12 cultural dimensions; CMNAT is the 2nd level of a 4 level training program.	Web-based; downloadable graphic profile and interpretation 208 questions generates profiles within 10 cultural dimensions; Forced choice questionnaire takes 10 minutes	Web-based; downloadable graphic profile and interpretation** 60 questions generate bar graphs of scores in 5 cultural dimensions compared to any of 60 country profiles, with suggestions for behavioral adaptation*	Web-and paper-based; profile and report with advice for doing business in other cultures Uses Fons Trompenaars' 7 cultural dimensions	Web-based; downloadable graphic profile and interpretation 20 questions; generates profile within 5 cultural dimensions and extensive suggestions for behavioral adaptations
Validation	No statistical support mentioned	Undergoing statistical validation	Cultural dimensions and values continua are recognized by Intercultural research	Cultural dimensions established by Geert Hofstede's research	Large research data base established by THT Consulting for cross-cultural comparison	Not statistically validated, but country scores drawn from existing research
Languages	English	English	English	English	English	English
Source	Coghill & Beery International http://www.coghillbeery.com/	Knowledgeworx http://www.knowledgeworx.com/	Training Management Corporation (TMC) http://www.tmc.com/	ITAP International http://www.itapintl.com/	Trompenaars Hampden-Turner http://www.thtconsulting.com/	Across Cultures, Inc. http://www.acrosscultures.com/