

20 Reproducible Assessment Instruments for the New Work Culture

Philip R. Harris

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Prologue

The **new work culture (NWC)** focuses on people and their development as human assets. It is also characterized by improved communication and information sharing as a means of enhancing performance. One means of accomplishing this is human factors **instrumentation** that not only increases self-awareness, but serves as a mechanism for discussion of the findings.

The twenty inventories and checklists provided in this handbook were developed over the course of the past thirty years of my consulting practice. During my earlier career in education and counseling, I learned the value of tests, questionnaires, and profiles to assess students. Therefore, it was logical when I went to full-time consulting to use a similar approach with personnel in both the private and public sectors. However, the commercially produced instruments did not always satisfy the needs of more than 190 diversified clients worldwide. Thus, as a management and organizational psychologist, I began to custom design data gathering, paper-and-pencil inquiries, and instruments for specific purposes of a system. For example, the original objective of the **Organizational Culture Inventory** was to deal with regional problems within the U.S. Customs Service; it was later modified for different reasons for the Los Angeles County Fire and Foresters Department.

Because of confidentiality and proprietary issues, I was never able to release the data and findings on information gathered from my clients. Sometimes I would develop an instrument to illustrate some concepts and use this as the basis of one of the 39 professional books I have written or edited. For example, when I wrote *Effective Management of Change* (1975) for Westinghouse Learning Corporation, I created the **Change Inventory for Leaders**, while the more advanced version, the **Inventory of Transformational Management Skills**, was designed in conjunction with the publication of *Management in Transition* (1985) by Jossey-Bass, Inc. Eventually, all these instruments were validated by the thousands of managers and executives who I served during training sessions.

Long ago I learned that adult education requires variety, in terms of both content and presentation. In human resource development (HRD), I adopted two strategies: (1) **action learning and research**; and (2) **MD/OD**, that is, organization development through management development. I describe these approaches in *High Performance Leadership* (1994), also published by HRD Press, Inc. Each chapter of that companion book centers on a key subject in the behavioral science approach to management. For the benefit of HRD managers and facilitators, each could become a training session, formulated around four I's—introduction, input, interaction, and instrumentation. To fully comprehend the material in this second volume of the **NWC** series, I urge readers to review the “Instrumentation” sections in *High Performance Leadership* (HPL). For instance, the **Management Communications Inventory** and the **Organization Communication Analysis** are not only discussed here in these pages, but also in the HPL Chapter 3, particularly in its last section.

What is unique about *Twenty Reproducible Assessment Instruments* is that (1) it has additional instruments not offered in the first volume, and (2) all the assessments may be reproduced by those who purchase this book. Thus, HRD professionals have permission to replicate these inventories, surveys, and questionnaires with their trainees. Throughout these chapters, we have provided information on why and how to use these data-gathering instruments. The latter have been grouped into four units. The initial seven are in a section entitled “Personal Assessment.” Whether at home or work, filling out and reviewing your analysis of these results will be beneficial. Relative to personal growth, our position is that in an Information Society, knowledge workers must be engaged in life-long learning—primarily about themselves so that they can acquire new competencies to meet the challenge of change.

In the 21st century, the British Henley Forecast Centre predicts that the working week for most people worldwide will be no more than 35 hours with ten weeks a year of vacation (contrast that to the 48-hour work week at the beginning of the 20th century). Further, these futurists indicate that the stages of human life will typically involve 20 years of childhood, education, and search for career; 35 years of work; and 25 years in retirement or second careers. The implication is that we will have much more leisure time to manage our lives more constructively. Sages over the ages have always urged “Know Thyself”—the data from these seven instruments should be used to advance personal growth in that regard. At work, they can also be used by HRD managers to further the career development of employees.

The second section is called “Team Assessment” and contains four complementary instruments for use with work or groups in which readers participate. The insights gained from using these instruments will help leaders and team members understand the dynamics of the group process and the performance of either the individual or the whole entity.

The third section on “Management Assessment” provides five more instruments that may be used by individual managers for self-assessment of their managerial role and effectiveness, or by executives to measure their subordinates.

The fourth section on “Organizational Assessment” ends with four instruments that can be used by HRD specialists or top management to evaluate the climate and environment of a company, an agency, or an association; the last two are particularly helpful to clarify one’s position in a system and to improve meeting management.

The text concludes with an Epilogue that reinforces the principal learnings for human resource development. Finally, the Resources section provides a select listing of instrument sources and related book references. For those seeking additional information, the third volume in the series will deal with *New Work Culture and HRD Transformational Management*.

Philip R. Harris, Ph.D.
LaJolla, California

Introduction

An instrument to collect data from someone or about that person, group, or organization may be a survey questionnaire, an inventory, a checklist, or an index. Essentially, it is an organized set of inquiries to gather details about individual or institutional preferences, attitudes, concerns, conditions, practices, and performance.

Data-gathering instruments provide information and insight that, when properly analyzed, can be used for personal or professional development. They can be employed for self-evaluation or for assessment of an employee, work unit, or system by one or more people, such as a manager or consultant, a team, or all personnel. In the context of formal human resource development (HRD), their use can enhance the learning process, such as a technique during a training session to make the experience more “life like” or realistic. Such queries can be a valuable means for appraising performance, judging team effectiveness or organizational health, or other such concerns. The field of marketing has always used surveys to better understand customer preferences and needs; now management increasingly uses a similar approach to learn more about their workforce.

Data-collection instruments are designed by investigators doing action research on a problem or issue—by HRD professionals seeking solutions to a predicament or quandary among individuals or within institutions. When a trainer is conducting a session on a particular topic—such as change, communication, culture, motivation, etc.—a survey instrument helps bring trainee views on these matters to the surface. The assessment experience can create awareness and sensitize people to the subject matter. Suppose you were using an inventory of 20 items on qualities most admired in leaders. On an overhead projector, newsprint paper, or chalkboard, the numbers 1 to 20 can be marked along the left side. Across the top, the facilitator can put the categories of choice—yes, no, maybe, or whatever. The members of a class or group would then be asked to come forward and put a check under the column heading and next to their answers for each item. In this manner, a quick group profile can be determined as to the consensus and differences among the responses. A lively discussion can then be conducted on the implications of the findings.

In contrast to self-administration, another way to use an instrument within a work unit is to have members pair up and rate one another on the items in question. When finished, the facilitator states a fixed amount of time for each to give their observations to the other (e.g., 15 minutes). The advantage of this approach is the sharing of perceptions so that the individual gets to see him- or herself the way others may view that person. Similarly, the same instrument can be used by an employee for self-assessment, and then by a supervisor to record his or her evaluations about that person, such as in the process of a performance appraisal interview. Still another variation is when a group uses an instrument for appraisal of their supervisor on the items under consideration.

Commercially produced instruments by a research institute, testing construction corporation, or consulting firm often include a manual for administration purposes. Usually it

contains statistical information on the item validity studies conducted by behavioral scientists who prepared the survey instrument. The items or questions might be arranged in the form comparable to an objective test, with categories, columns for choices, and other such layout arrangements that facilitate ease of responding, scoring, and reporting. Instruments range from homemade paper-and-pencil questionnaires to sophisticated marking/scoring/reporting systems using special software and computers. For example, the National Computer System (NCSI) of Minneapolis has an *EPS Executive Profile Survey* based on a decade of research for the purpose of improving executive performance. Through 94 multiple-choice questions, EPS measures self-assessment of attitudes, beliefs, and values. The data obtained is helpful in career guidance, recruitment, and outplacement services. The results can be compared with a database for 2,000 top management professionals who have completed the survey, using 11 profile dimensions (ambitious, assertive, enthusiastic, creative, spontaneous, self-focused, considerate, open-minded, practical, relaxed, systematic). Computer scoring leads to an interpretative report with graphs and explanations.

Another illustration of feedback instruments is offered by the Center for Creative Leadership (CCL), headquartered in Greensboro, North Carolina. Among several programs is *Skillscope*, which supplies a participant workbook plus nine copies of a questionnaire assessing 98 managerial skills organized in 15 clusters—one copy is for the participating manager to complete, while the other eight go to boss, peers, and direct reports to fill out on that person. All return the results to CCL for confidential scoring and reporting to a feedback facilitator within the organization. Another CCL program entitled *Benchmarks* is for HRD executives, line managers, and other developmental specialists to learn to use research-based assessment tools within their company or agency. A third alternative is the *Campbell Development Surveys Workshops* (co-sponsored by CCL with NCSI)—day-long sessions to learn how to use the Campbell Interest and Skill Survey, one of a series of psychological surveys developed by Dr. David Campbell. CISS analyzes leadership effectiveness, career interests and skills, and work satisfaction.

A final instance is from our own publisher, HRD Press of Amherst, Massachusetts. It issues several sets of tools for data-gathering, such as *The Needs Assessment Coursebook and Workshop* by Henry Sredl and Charles Chesney; *Competency-Based Performance Improvement* by David Dubois; *Good Fair Tests: Test Design and Implementation* by Odin Westgaard; *Total Quality Transformations* by Marlene Caroselli; and numerous activity books that include training materials, such as instruments.

The overall value of various data-gathering mechanisms includes the following:

- They stimulate participants' thinking and awareness about themselves and others.
- They make feedback about behavior and performance objective and impersonalized.
- They serve as a basis for discussion and learning, as well as for personal and organizational development.

The important point for HRD practitioners is to **let the data speak for itself**. Rather than the consultant's "words of wisdom," build instead upon what the data itself implies for that individual or institution. For example, when briefing top management on the meaning of findings from an organizational culture survey, the data will provide indications of the type of organization development strategies needed.

Now use your creative imagination to utilize the following 20 instruments to improve the performance of yourself, your team, your management, and your organization!

from *20 Reproducible Assessment Instruments
for the New Work Culture*

by

Philip R. Harris, Ph.D.

Organization: _____	Group: _____
Location: _____	Date: _____

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Part 1

Personal Assessment

1 Human Resources Inventory

PURPOSE:	To help individuals assess their personal achievements, competencies, and goals and to facilitate development of personal growth and life-planning strategies.
DESCRIPTION:	<p>This instrument consists of three sections:</p> <ul style="list-style-type: none"> • <i>Life Values</i> examines the individual's perceptions of self in the present, five years past, and five years in the future on 21 aspects of human values such as self-awareness, independence, joyfulness, etc. • <i>Individual Competencies</i> assists the individual to focus on past attainments and objectives in nine aspects of personal and professional life including professional and educational attainment and intellectual and social competencies. • <i>Human Relationships</i> allows the individual to examine satisfaction with his or her relationships in ten types of interactions.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is based on thorough research of the literature in the human relations field. In the design of this instrument, every reasonable effort was made to ensure proper universe of content and simplicity of wording.
ADMINISTRATION:	Self-administered. Requires about one hour. Review of the instrument with a person significant in the respondent's life is recommended.
APPLICATION:	<ul style="list-style-type: none"> • Life/career planning • Personal assessment and growth
SUITABLE FOR:	All levels
SCORING:	This is a self-analysis instrument and is not designed to be scored.

Human Resources Inventory

Life Values

Below are several descriptions of major life purposes or primary motives. For each category, read the description and place a capital “P” at the scale position that best describes your present estimate of self. Then place a small “p” at the scale position that best describes your past, where you stood five years ago. Finally, mark “F” on the scale to indicate your goal aspirations for the future, where you want to be in the next five years. After you have done this for each scale, review the entire set of dimensions to evaluate where you have been, where you are now, and where you want to be in the future. The list is certainly not inclusive, so space is left for you to add items you feel are important life values, goals, or concerns.

1. **Self-Awareness:** personal knowledge of the forces and factors that motivate you and influence your behavior

No awareness

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Full awareness

2. **Leadership:** ability to influence people and situations positively; to exercise personal impact; to be assertive in relations with others

Non-influential

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Fully influential

3. **Affection:** capacity to both give and receive love from others; to establish meaningful, close, warm personal relationships with others)

Impersonal

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Personal

4. **Independence:** ability to control one’s life space; ability to be autonomous; ability to make one’s own decisions; freedom to act according to one’s own conscience

Dependent

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Independent

5. **Self-Appreciation:** valuing your own uniqueness and abilities; seeing yourself as a positive self; accepting what you are and can become, as well as your limitations

Self-depreciation

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Self-appreciation

6. **Self-Congruence:** being comfortable with yourself and sensitive to your impact on others; being your real self regardless of the situation; being authentic and acting with integrity

Incongruent

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Congruent

7. **Responsibility:** ability to persevere; to be responsible; to be dedicated to the pursuit of personal values and ideals; to be committed to the goals of your profession or organization; to stick to a job and get it done

Irresponsible

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Responsible

8. **Competency:** capacity for excellence in chosen vocation or profession; adequate updated knowledge and skills in your role or specialized field or endeavor

Less competent

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Most competent

9. **Initiative:** ability to motivate and actualize self to be a self-starter; to accomplish things; to move energetically

Non-initiative

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Initiative

10. **Acceptance:** understanding and accepting other people for what they are and can become; respecting the dignity of others and valuing their uniqueness; unconditional regard for others

Non-accepting

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Accepting

11. **Trust:** ability to have confidence in others versus being suspicious and controlling; capable of being trustworthy

Suspicious

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Trusting

12. **Creative:** ability to be innovative; to experiment with new approaches; to generate original thought

Uncreative

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Creative

13. **Cooperativeness:** ability to work with others in a collaborative fashion; to be an effective member of a team

Uncooperative

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Cooperative

14. **Helpfulness:** capacity to give and receive help; to be concerned about others and render assistance; to share generously of one's self

Helpless

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Helpful

15. **Recognition:** ability to achieve; to have one's abilities known and used in a meaningful fashion; to be seen as a valuable person in a group or organization

Non-recognition

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Recognition

16. **Risk-Taking:** ability to take risks to accomplish what one feels is necessary; to dare to be different; to follow one's conscience; to be creatively deviant

Cautious

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Risk-taking

17. **Facilitating:** ability to reconcile or mediate, to foster and develop, to resolve conflict and bring together people who differ; to heal interpersonal hurts; to be a peacemaker and relieve tension

Non-facilitative

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Facilitative

18. **Sociability:** ability to be with and to work with people; to be friendly, gregarious; to enjoy social relationships

Unsociable

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Sociable

19. **Joyfulness:** capacity to really enjoy living; to be happy with self and others; to experience fulfillment in one's experiences and life situation; to bring joy to others

Sad

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Joyful

20. **Human Service:** to seek to serve the welfare and advancement of mankind in a meaningful fashion; to serve humanistic goals; to serve community and country; to make the world better for your presence in it

No human service

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Human service

21. **Self-Realization:** degree to which one is presently maximizing his or her own human potential; working toward being the person he or she can and wants to be; seeking self-fulfillment

Non-realizing

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

 Realizing

22. **Others:** in your own words, list any other values or concerns that are strong motivations for you in your present situation

Re-examine the above list of personal value dimensions to evaluate yourself in terms of past, present, and future. Identify below some areas in which you would like to change and enumerate some strategies for achieving such personal change. Analyze factors that will block these personal growth plans.

Areas

Strategies

Obstacles

Individual Competencies:

Each person possesses unique skills and accomplishments. Identify some of these special strengths and talents as revealed in the past in your relationships, your work, your family, or your hobbies. Also list those areas in which you find you have personal limitations. Such enumeration may help you group your personal assets and liabilities.

- A. **Professional Attainment:** List major vocational and professional successes and then your objectives or potential, both in terms of wishes and opportunities, based on life experiences to date.

Attainments

Objectives

- B. **Educational Attainment:** List educational accomplishments and needs and major areas of interest you wish to pursue; ask yourself if further or continuing education is desirable or necessary.

Attainments

Objectives

- C. **Intellectual Competencies:** Analyze your unique rational or mental abilities—intelligence or capacity to apply knowledge; ability to conceptualize and to perceive relationships, etc.

Attainments

Objectives

- D. **Judgment Competencies:** Determine your ability to abstract essences and make reasonable decisions; capacity to differentiate between fact and fiction; ability to weigh ideas, discriminate, and solve problems.

Attainments

Objectives

- E. **Social Competencies:** List your skills in interpersonal and human relations; capacity to deal with people on a one-to-one, group, or organizational level, etc.

Attainments

Objectives

- F. **Physical Competencies:** List physical prowess and appearance; athletic/outdoor abilities; skills to construct with hands, etc.

Attainments

Objectives

- G. **Aesthetic Competencies:** Assess your responsiveness and appreciation of beauty in art or nature; good taste; capacities in arts, crafts, music, literature, etc.

Attainments

Objectives

- H. **Actualizing Competencies:** Analyze your ability to make decisions and to perform; to act effectively upon judgment; to cope effectively; to motivate self beyond present level of accomplishment; to be opposite procrastination; to be apathetic and immobilized by fear.

Attainments

Objectives

- I. **Personal Competencies:** List your security within self, confidence, and congruence; emotional strengths; personal integration, character, etc.

Attainments

Objectives

Now that you have examined your present and past situation, your strengths or assets, and your personal directions for growth, you can examine strategies to maximize your potential. Analyze those factors in yourself, in others, and in the work situation that both supports and blocks your personal growth goals. Secure feedback on your self-evaluation from others to check for discontinuities. Experiment with new behaviors to maximize your own personal growth tendencies and then seek continuous feedback to assess how you are doing.

Hopefully, this instrument will emphasize that you are a unique, dynamic, changing person. There is no one else alive now or in the past or future quite like you!

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 2. Amherst, MA: HRD Press, Inc.

2 Leadership Motivation Inventory

PURPOSE:	To provide individuals with feedback on their personal needs and goals. To assist managers to examine and evaluate factors that motivate their employees.
DESCRIPTION:	Respondents select five primary and five secondary motivating factors from a list of 28 items based on Maslow's Hierarchy of Human Needs. An accompanying worksheet enables respondents to view the pattern on their responses on the pyramid model and to compare individual and/or group profiles with results of a national study based on a similar instrument.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of the instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Requires 20 to 25 minutes to complete.
APPLICATION:	<ul style="list-style-type: none"> • Motivation Studies • Supervisory Training • Personal Development
SUITABLE FOR:	All levels
SCORING:	Internal group profiles can be developed for discussion purposes.

Leadership Motivation Inventory

A. Please place an X next to the five items below that you believe are *most important* in motivating you to do better work:

- | | | |
|-----|-------|-----------------------------------------------------------------------------|
| | _____ | 1. Assurance of regular employment |
| (P) | _____ | 2. Satisfactory physical working conditions |
| | _____ | 3. Suitable rest periods and coffee breaks |
| | _____ | 4. Adequate vacation time and holidays |
| | _____ | 5. Good pay |
| | _____ | 6. Having an efficient supervisor who tells me exactly what's expected |
| | _____ | 7. Clear organizational objectives so that I know where I stand |
| (S) | _____ | 8. A good performance rating so that I know where I stand |
| | _____ | 9. Pensions and other fringe benefits (insurance, etc.) |
| | _____ | 10. A written job description that tells what is expected of me |
| | _____ | 11. Maintenance of adequate living standards for my family |
| | _____ | 12. Means for knowing what is going on in the organization (inclusion) |
| | _____ | 13. Being told by my boss that I am doing a good job |
| | _____ | 14. Getting along with others on the job by being cooperative |
| (B) | _____ | 15. Participation in management activities (e.g., attending staff meetings) |
| | _____ | 16. Receiving appreciation feedback when work is well performed |
| | _____ | 17. Being kept informed on what's happening in the organization |
| | _____ | 18. The support received from fellow workers in a work unit |
| | _____ | 19. Means for promotion and advancement |
| | _____ | 20. Feeling that my job is important |
| | _____ | 21. Respect of me as a person and/or as a professional at my job |
| (E) | _____ | 22. Chance to turn out quality work |
| | _____ | 23. Opportunity to gain status in the organization |
| | _____ | 24. Means of achieving and proving myself |
| | _____ | 25. Obtaining more freedom and independence on my job |
| | _____ | 26. Opportunity to do challenging and meaningful work |
| (A) | _____ | 27. Opportunity to experience a sense of accomplishment |
| | _____ | 28. Other: _____ |

- B. Place a T next to five more items that you consider to be of secondary importance in motivating you to do better work.
- C. In Figure A below of the Maslow pyramid, write the numbers of your primary motivations (those marked X in Step A) and secondary motivation (those marked T in Step B) in one of the categories.
- D. You may wish to compare your own or your group's results with those of the national survey that was similar to this assessment (see Figure B).
- E. As a follow-up to this instrument, you may wish to obtain extra copies of this instrument and administer it to your work team or subordinates. Then compile a profile for the group when all the scores are entered into the pyramid.

Figure A. Maslow's Hierarchy of Needs

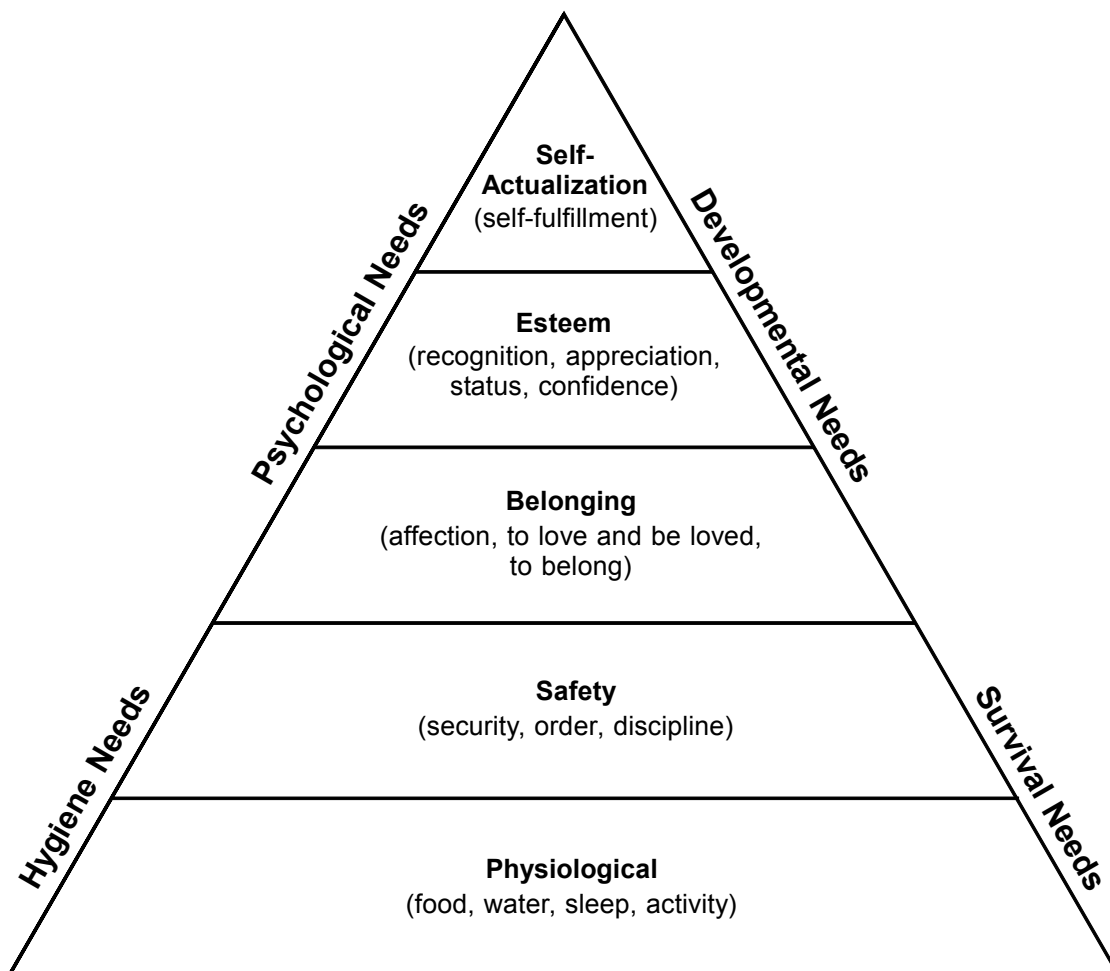


Figure B. Job Motivational Factors

Summary of 1,522 responses from both government and private business to the following request:

“Please indicate the five items from the list below that you believe are important in motivating you to do your best work.”

Rank Order		Number of Responses	Percentage
1	Feeling my job is important	920	61
2	Opportunity to do interesting work	863	57
3	Opportunity for self-development and improvement	757	50
4	Respect for me as a person	665	44
5	Chance for promotion	654	43
6	Good pay	651	43
7	Chance to turn out quality work	494	32
8	Knowing what is going on in the organization	423	28
9	Large amount of freedom on the job	356	24
10	Steady employment	315	21
11	Being told by my boss when I do a good job	294	20
12	Getting along well with others on the job	251	16
13	Chance to do work not under direct or close supervision	225	15
14	Having an efficient supervisor	179	12
15	Agreement with agency objectives	162	12
16	Good physical working conditions	137	0.9
17	Getting a good performance rating so that I know how I stand	94	0.6
18	Pensions and other security benefits	64	0.4
19	Miscellaneous	34	0.2
20	Attending staff meetings	16	0.1
21	Having a written description of duties of my job	16	0.1
22	Fair vacation time	15	0.1
23	Knowing I will be disciplined if I do a poor job	9	0.06
24	Not having to work too hard	6	0.04
25	Adequate rest periods and coffee breaks	5	0.03
26	Having an employee council	3	0.02
27	Having an employee paper, bulletin, or newsletter	3	0.02

Notes: Compare your results, or that of your group’s profile, with the study.

Maslow also maintains that one’s gripes or grumbles vary with the need level. Man is always seeking a fuller life, so as his complaints are satisfied at the level of basic needs, he becomes more aware of other concerns, such as social injustice.

Response Items Summary:

A	=	27 – 30
E	=	20 – 26
B	=	12 – 19
S	=	5 – 12
P	=	1 – 4

Note: This pyramid model is based on the research of the late psychologist, Dr. Abraham Maslow.

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 2. Amherst, MA: HRD Press, Inc.

Elashmawi, F., & Harris, P. R. (1993) *Multicultural management*, Chapter 6. Houston, TX: Gulf Publishing.

3 Values Imprint Survey

PURPOSE:	To create awareness of individual values or priorities as a result of life imprints upon you from being born, reared, and educated in a certain place, situation, and time period.
DESCRIPTION:	Respond to 10 basic questions relative to the influences upon you—personal and professional priorities, value differences, prejudices and biases, value reconsiderations, acquisition of new values, organizational values, transformational values, value evolution, competing values.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this survey, is both important and useful. In the design of the survey, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Requires 20 to 30 minutes to complete.
APPLICATION:	<ul style="list-style-type: none"> • Culture/Heritage Studies • Personal and Career Development • Family Counseling
SUITABLE FOR:	Adolescents and adults
SCORING:	There are no right or wrong answers. Respondents can be paired up for discussion of value differences. A group profile of replies can be developed to ascertain any consensus in value systems.

Values Imprint Survey

Introduction

Each of us has his or her own unique life space or energy field that is both psychologically and physically demarked from others. In this “private world” in which we live, there are many external and internal forces that influence our behavior. As we grow up, we seek to make sense out of the happenings and experiences of our lives. We literally construct a system for reading meaning into our world or space. Some of this psychological construct is genetically programmed—our biological and cultural heritage. Much is acquired through family, education, religion, work, and social experience. It is part of our cultural conditioning and is subject to change when it is no longer relevant or appropriate. Consciously or not, this construct, to a large extent, governs our behavior, including our values and ethics.

Values are derived from our cultural heritage and this psychological construct. The concept has been defined in the *Random House Dictionary* as relative worth, merit, or merit judged or assigned to an object or action. In society, a group of people regard or value some activities, ideas, customs, or institutions positively (e.g., cleanliness or education) or negatively (e.g., crime or prostitution). Such judgments are culturally relative, depending on time of the world, place, and group circumstances. All human beings have needs that are prioritized, thus establishing one’s values (e.g., money, recognition, excellence). Your psychological construct, including your value system, guides the way you work, play, and even worship, impacting your whole lifestyle.

Please answer the following questions for your own self-awareness.

1. **Where did your values come from?** List below some of the influences on your attitudes, philosophy of life, and unique belief system:

a) _____	e) _____
b) _____	f) _____
c) _____	g) _____
d) _____	h) _____

2. **What are now some of your personal and professional priorities?** List below, in terms of your human needs, what you consider to be important or value:

a)	_____
b)	_____
c)	_____
d)	_____

3. **How do your values differ...**

- a) From those of your spouse/partner? _____

- b) From your offspring/younger generation? _____

- c) From your boss? _____

- d) From subordinates? _____

4. **Within your value system/structure, are there prejudices or biases of which you are personally aware?** If so, identify a few:

- a) _____
- b) _____
- c) _____
- d) _____

5. **Among your long-cherished values, are there some now subject to reconsideration or re-definition?** If so, identify a few:

- a) _____ c) _____
- b) _____ d) _____

6. **Are there some new values to be explored or acquired by you?**

- a) _____ c) _____
- b) _____ d) _____

7. **Are there some new values that you should take responsibility for promoting in your organization?**

- a) _____ c) _____
- b) _____ d) _____

8. **What are some of the major turning points in your life that caused you to re-evaluate your values?** List below some major transitional experiences that stimulated you to change your values or lifestyle.

- a) _____ c) _____
- b) _____ d) _____

9. In the evolution of your value system and life patterns, what are some of the current influences or happenings causing you to examine your options, choices, or how to gain more balance?

- a) _____ c) _____
 b) _____ d) _____

10. **Inventory of Competing Values**

Sociologists have been doing research on competition among contemporary values and the probable cost. Reviewing their findings, Professor Gywnn Nettler of the University of Alberta has summarized the principal ones. Ask yourself how you feel about each one:

Value	Probable Cost
A. Equality	Freedom
B. Freedom to reproduce	Quality of life
C. Freedom of movement	Congestion/ethnic separation
D. Social mobility	Discontent/status inconsistency
E. Mass communication	Cultural homogenization
F. Reduced infant mortality	Population pressure/famine
G. Improved living standard	Industrial technology spread
H. Affluence	Boredom/dependency
I. Mass education	Indoctrination/awareness
J. Scientific technology	Environmental pollution/ecology
K. Wellness lifestyle	Hospital decline
Others	
L. _____	_____
M. _____	_____

Observations on Values and Americans by Alexis de Tocqueville, a 19th Century Frenchman, writer, and observer of democracy in the United States of America:

“He defines mores as habits of the heart; notions, opinions, and ideas that shape mental habits; the sum of moral and intellectual dispositions of people in society... For as Tocqueville saw, the American was a new kind of person, a tentative character type shaped by inherited values on the one hand, and the challenges of the expanding frontier on the other.”

[From *Habits of the Heart—Individualism and Commitment in American Life* by R. N. Bellah, R. Madsen, W. M. Sullivan, A. Swidler, and S. M. Tifton. Berkely, CA: University of California Press, 1985].

Post-script: What are your “habits of the heart” now that you have completed this survey? How did the American value system change from the 19th to the 20th century? Why is it likely to be further modified in the 21st century?

Recommended Reading

Elashmawi, F., & Harris, P. R. (1993). *Multicultural management*, Chapters 3 and 4. Houston, TX: Gulf Publishing.

4 Quality of Life Index

PURPOSE:	To assess an individual's wellness lifestyle and to encourage self-health management.
DESCRIPTION:	This 30-item assessment instrument measures the respondent's perception of his or her effectiveness in the areas of physical self-care; psychological, philosophical, and social well-being; and lifestyle. A discussion of the rationale for managing all aspects of one's own wellness is included.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is based on thorough research. In the design of this instrument, every reasonable effort was made to ensure proper universe of content and simplicity of item wording.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 15 to 20 minutes to complete.
APPLICATION:	<ul style="list-style-type: none"> • Wellness and Health Management • Stress Management • Family Counseling
SUITABLE FOR:	<ul style="list-style-type: none"> • Managers and other professionals • Family members
SCORING:	Content analysis recommended for sets and individual items. A score of 75 or less may indicate a need for remedial action.

Quality of Life Index

Directions:

The underlying concept of this index is that staying well gives one greater control over his or her life, and is less costly than getting well after illness. This instrument provides the employee with a means for self-assessment of one's regimen for well-being. It can be filled out individually or by a team of individuals who work together and are concerned about the quality of their lives. It can be analyzed in terms of one's own self-health management, or in terms of corporate policy to improve the quality of work life. On each item in the six categories, rate self on a scale of 1 (lowest) to 5 (highest).

I. PHYSICAL SELF-CARE

- _____ 1. I have a thorough examination by a physician annually and act on the results for improved health. (**Note:** Periodic physical checkups update both you and your personal physician on your conditions/medications.)
- _____ 2. I seek nourishing food and beverage, trying to control diet to avoid over/under weight conditions. (**Note:** Well-balanced diets are usually low in fat, protein, cholesterol, and calories—more fruit and vegetables, less animal and dairy products.)
- _____ 3. I exercise daily with a regular routine, and try to maintain balance in my physical fitness regimen. (**Note:** Ideally, this physical activity is built into one's daily schedule and becomes a part of one's lifestyle.)
- _____ 4. I manage to get sufficient and tranquil sleep for maintaining peak performance. (**Note:** The number of hours for such rest is relative, though 6 to 8 hours a night is recommended, unless supplemented by naps during the day.)
- _____ 5. I avoid body abuse, whether through overwork, misuse of drugs, alcohol, tobacco, or caffeine intake. (**Note:** Maintaining body soundness requires positive actions for fitness and avoiding debilitating behavior.)
- _____ 6. I project a healthy body image and am able to do what I am capable of doing with energy and intensity. (**Note:** This refers to general body appearance from condition of dress and physical cleanliness to body language, as well as physical capacity.)

II. PSYCHOLOGICAL

- _____ 7. I strive to keep mentally alert by seeking new and varied input to increase my information/knowledge. (**Note:** Mind expansion may occur informally, such as through selected reading, or formally, such as through some means of continuing education.)
- _____ 8. I try to be creative and open to new ideas. (**Note:** This implies an experimental attitude, allowing intuition to be exercised, and listening to others.)
- _____ 9. I cultivate a positive mental attitude and express self-confidence. (**Note:** This involves ridding oneself of excess negativism, depression, or sense of insecurity and inferiority.)
- _____ 10. I value my independence, while not being adverse to being interdependent. (**Note:** While seeking autonomy of action, one is able to cooperate without becoming overly dependent on either people, situations, or substances.)
- _____ 11. I am able to relax and can “recreate” in diverse ways. (**Note:** Leisure is constructively used for both ample and varied activities; one is able to have fun and be interested in many experiences.)
- _____ 12. I am able to express feeling and experience a full range of human emotions. (**Note:** This means one can feel and convey everything from joy to sadness without inhibiting emotions, yet can exhibit balance or control in such expressions.)

III. PHILOSOPHICAL/SPIRITUAL

- _____ 13. I have a firm sense of direction and values in my life. (**Note:** That is, one strives to achieve goals and sets priorities as to what is important or not.)
- _____ 14. I can envision my existence in a larger context and have purpose to my actions. (**Note:** Able to relate one’s life beyond the material to the spiritual side of the human experience.)
- _____ 15. I cultivate my talents in some intellectual and cultural pursuits. (**Note:** A multi-dimensional person who seeks to develop one’s aesthetic senses through art, music, books, etc.)
- _____ 16. I have a zest for life and am enthusiastic about experiencing its variety and richness. (**Note:** Pursuit of life-enhancing relationships and activities.)

- _____ 17. I seek meaning in my life and meaningful associations. (**Note:** Activities are undertaken with purpose, while relationships are formed with selectivity; escapism is avoided.)
- _____ 18. I devote time to thinking and contemplating. (**Note:** Develops quiet times to ponder, meditate, pray, do yoga, enjoy nature and its beauties.)

IV. SOCIAL

- _____ 19. I try to stay connected with family, friends, or social contacts. (**Note:** Avoids social isolation and reaches out to others.)
- _____ 20. I network with professional and business colleagues. (**Note:** Maintains personal or electronic associations for information and knowledge exchanges.)
- _____ 21. I am capable of meaningful friendships and intimacy. (**Note:** Able to give and share one's self at deeper, more personal levels.)
- _____ 22. I am considerate of other's needs, respect their privacy, and am tolerant of their views or foibles. (**Note:** Able to put myself into the other person's perspective or life space without prying or imposing.)
- _____ 23. I am helpful, trusting, and forgiving with others. (**Note:** Can provide appropriate assistance as warranted, and be loyal to those who trust/depend on me.)
- _____ 24. I can confront, negotiate, and handle conflict. (**Note:** Able to say "no" and level with people, to problem solve and compromise, and to channel energies when people disagree.)

V. LIFE STYLE

- _____ 25. I try to maintain balance in my life and avoid excess. (**Note:** Able to regulate or moderate activities to avoid addiction to work, hobbies, or substances.)
- _____ 26. I sense the feedback my body gives me, and act to preserve good health. (**Note:** Attunes to one's biorhythms, symptoms, and signals of fatigue, illness, or potential "burnout," acting to correct the unhealthy or life-threatening situation.)

- _____ 27. I develop positive and healthy habits/attitudes. (**Note:** Practices that will enhance life quality, such as orderliness, openness, optimism, as well as nutritional food intake, watching one’s weight, avoiding salt or smoking, adequate daily exercise.)
- _____ 28. I manage stress and tension so that I am not unnerved or overwhelmed. (**Note:** Attitudes and practices that counteract hypertension, such as playing, using hot tub/steam room/sauna, taking a nap or deep breathing exercises, listening to music, practicing dance or gymnastics.)
- _____ 29. I create a lifestyle that delimits my personal stressors, while enhancing the quality of my existence. (**Note:** Being aware of stress exhaustion or tension symptoms, and practicing counteractions for better coping/living.)
- _____ 30. I seek counsel from professionals, colleagues, or friends when I am finding it difficult to cope. (**Note:** Being aware of one’s limitations and problems, and being realistic about obtaining help from others.)

Total Assessment Points: _____

Resolutions

What specific action plans will you undertake in the next six months to improve the quality of your life? Be specific, and number these actions below:

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 2. Amherst, MA: HRD Press, Inc.

Harris, P. R., & Moran, R. T. (1992). *Managing cultural differences*, Chapters 9 and 12. Houston, TX: Gulf Publishing.

5 Relocation Preparation Index

PURPOSE:	To assist employees and their families who must relocate to another place and culture, whether in their homeland or in a foreign country. To lessen “culture shock” in acculturation to the new environment and people.
DESCRIPTION:	Completing this extensive checklist will improve one’s readiness to meet the challenges of change involved in a move from one area to another, whether at home or abroad. The five parts of this instrument allow for examination of change challenges, the new assignment, alterations in attitudes and outlook in that regard, and how living in the location will affect one’s life and family.
VALIDITY:	The construct or syndrome of interrelated behaviors covered by this instrument is based on the author’s research on deployment issues, especially to foreign countries and outer space. He is indebted to the insights and publications of the late John M. Hoffman, founder of Family Relocation Service, Inc., and his colleagues in that organization.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 30 to 50 minutes to complete thoroughly. Should be utilized in conjunction with two other instruments in this book— <i>Change Inventory for Leaders</i> and <i>Intercultural Relations Inventory</i> —both of which are complementary inquiries.
APPLICATION:	<ul style="list-style-type: none"> • Domestic, foreign, and space deployment • Orientation/training for transitional experience • Pre-departure family discussions regarding transfers
SUITABLE FOR:	Employees and families prior to relocation
SCORING:	Content analysis by section. Possible review and counsel by personnel or human resource manager. See recommendations at the end of the Index.

Relocation Preparation Index

Introduction

Many people become very comfortable with the environment and community within which they live and work. However, career needs sometimes require that we move to another place and position. For some, this may be a challenge; for others, it may prove traumatic. Relocation to an alien or unfamiliar environment can prove to be turning points in our lives and careers, depending how we benefit from the transitional experience. It depends on how well we ready ourselves for the new local and organizational culture. If the transfer is within one's own country, then the shift may be from a mainstream to micro culture—such as in the United States, when the deployment is from the North to the South, or from the East to the Midwest or West, because all these regions have different local cultures and lifestyles. The change is even greater when it is to a foreign country where the national or macro culture is quite different, such as a different language spoken and customs practiced. The relocation is also more difficult when it is to an extreme or isolated environment, such as an offshore oil rig, a submarine, a remote military base or forestry station, an Arctic or Antarctic outpost, or even outer space. Imagine the challenges when one travels aloft to live and work on a space station or lunar base for long-duration missions. The more prepared we are for the altered or unknown situation, the better the adjustment and the less shock in the process of acculturation.

Relocation expands our perceptions and is an opportunity for both personal and professional development.

1. The Challenges in the Change

Place a checkmark (3) in the box appropriate to your current relocation. If the inquiry is not applicable, then leave the choices blank.

	Yes	Maybe	No
1.1 I am open-minded and flexible about this change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.2 My family/dependents are accepting of this change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.3 This relocation is voluntary on my part.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.4 This relocation represents career advancement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.5 This transfer is domestic, within my home culture.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.6 This transfer is international, to a foreign culture.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.7 This transfer is relatively permanent, not temporary.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.8 This relocation is being paid by my employer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1.9 I have obtained a reliable real estate broker/agent in the new location to help with my housing needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Yes	Maybe	No
1.10 I have obtained a reliable banker in the new community.	0	0	0
1.11 I have access to reliable legal/accounting services there.	0	0	0
1.12 I have obtained general information about the new locale.	0	0	0
1.13 I have obtained accurate information for me and/or my dependents regarding area schools, cultural/social/religious opportunities in the new community.	0	0	0
1.14 I have determined the form of local government, its services, and its requirements as they affect me (e.g., policy protection).	0	0	0
1.15 I have determined the information that the worthwhile media can provide to me in the new community.	0	0	0
1.16 I have retained the services of a reliable moving company and determined the extent of their relocation services/charges.	0	0	0
1.17 I have planned the best transportation arrangements given the costs/circumstances, and made any necessary reservations.	0	0	0
1.18 I have checked with travel services or publications for necessary maps and related information (e.g., Automobile Association, National Geographic, area handbooks, etc.).	0	0	0
1.19 I have sought a briefing on the new locale from natives or those very familiar with the area.	0	0	0
1.20 I have arranged for necessary mail transfer, telephone services, and utilities for my new home.	0	0	0
1.21 Other: _____			

2. The New Assignment

2.1 The position—title and description: _____

2.2 The objectives and goals of this position: _____

2.3 The role and its relationship to others for reporting or accomplishment:

2.4 The estimated length of this assignment: _____

2.5 The future career prospects in accomplishing this assignment:

2.6 The compensation/benefits policy for this position:

a) Salary: \$ _____ paid: weekly bi-weekly monthly

b) Special allowances: _____

c) Travel/moving assistance: _____

d) Cost of living assistance: _____

e) Insurance provisions: _____

f) Housing: _____

g) Schooling: _____

h) Child care: _____

i) Vacation/leave provisions: _____

j) Retirement provisions: _____

k) Tax and payroll deductions: _____

l) Repatriation/re-entry provisions: _____

m) Other: _____

2.7 The preparation for the assignment:

a) Orientation/training: _____

b) Introductory visit: _____

- c) Language/cultural guidance: _____
- d) Host person/mentor: _____
- e) Passport/visa requirements: _____
- f) Medical examination/inoculations: _____
- g) Shipping/storage arrangements for personal belongings: _____

- h) Additional travel arrangements, allowances, and transfer services: _____

- i) On-site assistance with customs, housing, dependent schooling, shopping, currency, area/culture orientation: _____

- j) Home leaves/relocation assistance on completion of assignment: _____

- k) Other: _____

3. Changes in Attitudes and Outlook

In the new community and position, are you and your family prepared to alter your present perceptions and life space? On a scale of 1 (low) to 7 (high), rate yourself on the following statements:

	Rating
3.1 Recognize that the new neighbors and co-workers have had a different life experience and do not necessarily view their world as you do.	_____
3.2 Appreciate that the people in the new location have different communication styles from where we come from—in terms of both verbal and non-verbal interactions (e.g., gestures).	_____
3.3 Prepared to learn the local language and communication patterns, and to be subtle in my conversations.	_____
3.4 Respect the local customs, taboos, and way of doing things.	_____
3.5 Realize that the organizational culture in the new office or place where I will work may do things quite differently from my previous experience.	_____
3.6 Appreciate that attitudes and viewpoints in the new environment may be quite different from my own, so be prepared to be flexible without compromising principles.	_____

- 3.7 Ready to evaluate the new people, procedures, resources, and situation before proposing any change. _____
 - 3.8 Secure in the knowledge of my own competencies and shortcomings, but prepared to be cooperative with others in the new situation who may differ from me. _____
 - 3.9 Able to cope with uncertainty and ambiguity in the new environment until I get a handle on the situation. _____
 - 3.10 Able to absorb and analyze information on the new situation before making decisions and alterations. _____
 - 3.11 Appreciate what is of value in the new culture and the practices of the “natives.” _____
 - 3.12 Aware that I am the “foreigner” in this relocation, so am prepared to operate at a different pace and to learn somewhat from the locals. _____
 - 3.13 Avoid communicating feelings of superiority to the locals. _____
 - 3.14 Resilient when things do not go my way and recover quickly. _____
 - 3.15 Flexible about changing my attitudes and outlook so that I am able to alter my previous psychological construct or view of “my world” as a result of input from new people and experiences. _____
 - 3.16 Convey to others that I am broadminded and tolerant, and respect their right to differ from me. _____
 - 3.17 Accept people for what they are as human beings, rather than because of their intellect, position, or influence. _____
 - 3.18 Sensitive and empathetic to the feelings of others, and alert to their reactions and feedback. _____
 - 3.19 Am self-sufficient and independent, but capable of accepting help in a strange or difficult situation, especially when the new experience disconcerts me. _____
 - 3.20 Aware that I am undergoing a transitional experience with this relocation and am prepared to be creative and resourceful in coping with this unique situation. _____
 - 3.21 Other: _____
-

4. The Relocation Experience

Again, using the 1 to 7 rating scale, evaluate how well you have prepared for the transition to a new situation.

	Rating
4.1 To facilitate my adjustment, I have consulted information and specialists to gain insights about people and the place I am moving to.	_____
4.2 To acculturate in the new community, I have cultivated a positive mental attitude (PMA) about the challenges ahead.	_____
4.3 To ease my entry, I have attempted to solve as many personal and professional problems before I depart so as not to bring this “excess baggage” to the new location.	_____
4.4 To further my acceptance in the new community and job, I am committed to learning the “language” (literally or figuratively) and social customs of the locals.	_____
4.5 To feel more comfortable in the new situation, I have searched out local resources that can “bring me up to speed” after my arrival.	_____
4.6 To lessen stress in the alien environment, I have done reasonable planning, making the necessary arrangements for housing, schooling, recreational/social outlets, or whatever.	_____
4.7 To avoid illness and depression, I have made medical and fitness preparations and connected with health resources in the new community.	_____
4.8 To further social acceptance, I have an open mind on the new people I will meet and am prepared to seek new compatriots or friendships while maintaining old ones from a distance.	_____
4.9 To make the most of the new experience, I am excited and knowledgeable about the opportunities within the new environment.	_____
4.10 To ensure reasonable security, both physical and psychological, I am taking precautions to live both defensively and safely so as not to place myself in “harm’s way.”	_____
4.11 To cope effectively with the geography and climate in the new location, I have prepared myself regarding food, dress, and other needs that will help me be more comfortable in my new “home.”	_____
4.12 Other: _____	_____

5. Recommendations

- 5.1 Review your answers to the Index, particularly your scores on the rating scales, and pinpoint where improvement is called for. As a result of this analysis, there should be some **action plans** to foster acculturation and lessen the shock of the relocation.
- 5.2 In conjunction with the Relocation Preparation Index (RPI), also complete two other instruments in this book: *Change Inventory for Leaders* and *Intercultural Relations Inventory*. The latter contains a model for analyzing your new culture in terms of these categories—communication style, food and diet, clothing, time sense, values and business ethics, work habits and practices, attitudes/practices toward minorities, family and marriage, customs, traditions, and beliefs.
- 5.3 Increase your pre-departure readings on the area to which you will be going (e.g., obtain the Chamber of Commerce information packet, contact the U.S. Department of Commerce for local information). Also consult books that provide insights of the cross-cultural adjustment, such as the *Managing Cultural Differences Series* edited by Drs. Philip R. Harris and Robert T. Morgan. In the parent book, *Managing Cultural Differences*, unit two is particularly helpful. Among the eight volumes in the series, you may find these useful: *Transcultural Leadership* (1993); *Multicultural Management* (1993); *Managing Cultural Differences Case Studies* (1994); and *International Director of Multicultural Resources* (1995). Available from Gulf Publishing Company (3301 Allen Parkway, Houston, TX 77019, USA. Telephone: 1-800-231-6275; fax: 713-525-4647).
- 5.4 If you are relocating to an extreme environment, one that is very isolated or confined, it is important to determine (a) whether you have the psychological stamina for such a situation with its unusual demands; and if you do, then (b) extra preparations are required. For example, a special type of clothing, communication arrangements with the outside world, special musical or entertainment audio or video cassettes, etc. Thus, were one to be a seafarer, you may wish to read *Living and Working in Space* (1992) by Philip R. Harris, available from Ellis Horwood/Prentice Hall (113 Sylvan Avenue, Englewood, NJ 07632, USA. Telephone: 1-800-1360 or 201-816-4141).

6 Change Inventory for Leaders

PURPOSE:	To examine a leader's attitudes about change and transition. To assist in the development of personal characteristics that facilitate and help leader's cope with change.
DESCRIPTION:	Respondents indicate their perceptions of themselves on 15 characteristics and capabilities that are necessary for effective change agents.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is based on thorough research on effective management change. In the design of this instrument, every reasonable effort was made to ensure proper universe of content and simplicity of wording.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 15 minutes to complete.
APPLICATION:	<ul style="list-style-type: none"> • Organization Development • Preparation of Planned Change • Change Attitude Survey • Management Skill Development
SUITABLE FOR:	Mid- to upper-level management
SCORING:	Not applicable. This is a learning and self-awareness instrument.

Change Inventory for Leaders

Do you have a positive or negative attitude toward change? Most people fear change, but the issue is whether you let such concern paralyze you into inaction. Some persons merely react to change; others are proactive—they plan and control change.

Part 1

The following checklist includes some characteristics of effective change agents. When completing this part of the inventory, think of yourself as an agent of change in your organization or community by evaluating yourself on these criteria, checking your present lifestyle in terms of one of the following: **Usually**, **Sometimes**, or **Never**.

1. **Openness:** willing to consider new ideas and people of differing opinions; tentative in communications, rather than dogmatic or closed-minded in one's approach.
 - Usually
 - Sometimes
 - Never

2. **Flexibility:** adaptable to new people, situations, information and developments; able to handle the unexpected and to shift position; spontaneous in responding to the “here and now” data and experiences.
 - Usually
 - Sometimes
 - Never

3. **Sensitivity:** conscious of what is happening to oneself and others in the communications about the change and its effects; aware of the needs and feelings of others because of the proposed change; able to respond empathetically.
 - Usually
 - Sometimes
 - Never

4. **Creativeness:** respond with resourcefulness to new people and situations; avoid stereotype answers and solutions; exercise initiative, imagination, and innovativeness.
 - Usually
 - Sometimes
 - Never

5. **Person-centered:** concerned more about people than task or mere progress; care what happens to the people involved in the change; support, encourage, inform and involve people in the decisions for change that they will be expected to implement; respect the right of dissent.
 - Usually
 - Sometimes
 - Never

6. **Goal-oriented planning:** develop a case for change with others that takes into account long-range objectives, while developing a plan with different stages or targets and short-term steps to accomplish the planned change; communicate these purposes and plans to all involved; state goals in terms that have positive value to those affected by the change.
 - Usually
 - Sometimes
 - Never

7. **Group understanding:** possess knowledge of the group process and skills in group dynamics; analyze the driving and resisting forces within the group relative to proposed change; understand the character, structure, needs and wants of the group or organization to be affected by change; involve entire group in change process.
 - Usually
 - Sometimes
 - Never

8. **Communicativeness:** promote open, circular interaction; able to analyze and clarify the problem and reasons for change; motivate members to desire change and to use their available resources; develop a helping relationship with others so that they can accept and live with the change.
 - Usually
 - Sometimes
 - Never

Part 2

Relative to your capacity to cope more effectively with rapid change in your own personal and organizational life, indicate your present typical response by checking the response that is most appropriate for each descriptive item in the paragraphs. Be self-critical in your appraisal, because no one will see these results but you, and it is intended as an exercise in “mind-stretching.”

9. **Changing image:** possess the capacity to re-evaluate my concept of myself based on new feedback, in order to expand my self-image; fluid in my self-conception, amplifying my sense of identity as a result of new encounters and experiences.
 - Usually
 - Sometimes
 - Never

10. **Changing construct:** willing to review periodically the way I read meaning in my life; flexible in my attitudes and perceptions in order to make “new sense” out of added inputs and insights; able to break out of “old mindsets” and to develop new rationale; able to accept, at times, inconsistencies and discontinuity in my life.
 - Usually
 - Sometimes
 - Never

11. **Changing values:** able to sense new needs in myself and others; to develop new and changing life values; to abandon past, ready-made values and ideals; to revise my expectations of self and others; and as a result, willing to re-examine the norms or standards that I have set for myself and others and to develop new ones as appropriate.
 - Usually
 - Sometimes
 - Never

12. **Changing role:** willing to have an unclear, hazy role in life or an organization—one that is dynamic and responds to current relevant needs; able to live with a role definition that is open-ended and subject to continuous clarification; accept new role definitions for women, for parents and spouses, for colleagues, for professionals and other career people.
 - Usually
 - Sometimes
 - Never

13. **Changing society**—able to be comfortable with impermanence or a lack of structure; capable of coping with constant alteration and perpetual transition; willing to live in changing times, without the traditional stability and reference groups; able to make the most of the present moment—the “here and now”—to be existential or “hang loose,” ready to combat unwarranted resistance to change in myself and the communities in which I participate.
- Usually
 - Sometimes
 - Never
14. **Changing goals**—concerned about actualizing my own and others’ potential, as well as increasing the levels of awareness and consciousness in both; seek improvement in my capacity for feeling and intuitiveness in creating and risk-taking; desire more knowledge and education for personal and professional development; willing to provide cultural leadership by experimenting with new lifestyles of adaptation to the demands of rapid change.
- Usually
 - Sometimes
 - Never
15. **Changing lifestyle**—willing to be more transient and mobile within and among organizations; able to change jobs and locations when appropriate; capable of abandoning old relationships when necessary and to search for new, more meaningful ones; willing to reject past stereotypes of other people, especially various minorities or foreigners; able to participate in team efforts to solve increasingly complex problems; able to cope with stress and urban crowding, lack of privacy, noise, pollution, and other modern discomforts, while seeking to improve these situations; capable of enduring discontinuities and disconnections in my life.
- Usually
 - Sometimes
 - Never

Note: The above inventory items are offered with a view to stimulating your thinking about planned changes within your personal and organizational life space if “future shock” is to be avoided or minimized. There are no “right” or “wrong” answers. Research indicates that people who check “usually” are moving in the direction of developing those qualities that make for a more healthy personality in today’s and tomorrow’s fast-changing world. Those who check only “sometimes” or “never” are challenged by such items to set new personal goals that enable them to move in the future to a state of mind or behavior whereby they can mark “usually” if they were to retake the inventory.

Two related instruments for use with this inventory are *Force Field Analysis* and *Transformational Management Skills*.

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 6. Amherst, MA: HRD Press, Inc.

Simons, G. F., Vazquez, C., & Harris, P. R. (1993). *Transcultural leadership*, Chapters 1, 8, and 9. Houston, TX: Gulf Publishing.

7 Force Field Analysis Inventory

PURPOSE:	To assist managers in planning and implementing organizational change.
DESCRIPTION:	Based on Kurt Lewin's research on the management of change, this instrument provides an 18-step procedure for the analysis of organizational benefits, identification of driving and restraining factors, and strategies for gaining acceptance of change.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of this instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Administration in ongoing work group situation is recommended. Requires 30 minutes to 2 to 3 hours, depending on size of group and complexity of planned change.
APPLICATION:	<ul style="list-style-type: none"> • Organization Development • Preparation of Planned Change • Management Development
SUITABLE FOR:	Mid- to upper-level management
SCORING:	Comparisons can be made of individual perceptions within a group to determine how each member views the driving and resisting forces.

Force Field Analysis Inventory*

1. Describe the change you wish to initiate: _____

2. Analyze the type of change (check one or more):

- | | | |
|-------------------------------|------------------------------------------|--------------------------------|
| <input type="radio"/> Policy | <input type="radio"/> Structure | <input type="radio"/> Attitude |
| <input type="radio"/> Program | <input type="radio"/> Procedures/methods | <input type="radio"/> Others |

3. **Self-Analysis:** Describe your relationship to the change and analyze your needs and motives for promoting it.

4. **Organization Analysis:** Describe briefly why the organization—or the larger society—will benefit from this planned change.

5. **Related Effects:** Describe the related effects this change may have on the socio-economic system in which it may be introduced.

6. **Identification of Change Agents:** Note the names of those people who can collaborate with you in the promotion of this planned change.

* This exercise is based on the theories of the late Kurt Lewin, a behavioral scientist who performed “pioneering” research on the subject.

7. **Analysis of Forces:** On the worksheet on page 57, list the driving and resisting forces in your life space that will promote or retard the introduction of this intended change. Within your perceptual field, analyze these forces, which may be persons, events, situations, customs and traditions, etc.

8. **Counter Arguments:** Anticipate objections that might be raised by those who resist the change and how you may deflect its force.

Argument: _____

Counter: _____

9. **Analysis of Dissent:** Listen to the valid objections to the change as you intend to promote it. If you are satisfied that the change is still worthwhile, what modifications should be made in your plan as a result of these objections? How would you revise the plan?

10. **Channel Resistance:** What steps can be taken to convert some resistance into a constructive force for the change?

11. **Inventory Resources:** What other resources are present in the organization that can be utilized in initiating and carrying out this change?

12. **Develop Your Case:** Summarize the case for change that you will later develop in detail.

Now do the investigation or research that makes the change worthy of support.

13. **Communicate Your Case:** Your reasons for the change must be properly conveyed to those who will be affected by the change; create a climate of readiness.

a) How? What media will you use to communicate this message? _____

b) To whom will you primarily direct this communication? _____

The above should not only include names of individuals, but divisions and departments within the organization.

14. **Other Strategy:** In addition to what has already been done, what other steps could you take to ensure the general acceptance of this change?

15. **Project Ahead:** If you understand your goal in this change, as well as the means for achieving it and your expectations if it is inaugurated, then you are in a position to predict the probable outcomes when this change is under way.

16. **Action Plan:** List the immediate steps to be taken to get the change accepted and functioning. You may wish to include a testing or pilot project phase.

Use the reverse side of these sheets if more space is needed. Such a plan should include *what* is to be done, *how* it is to be done, *who* is to do it, and *when* it is to be done. It should include a data-gathering stage before communication.

17. **Alternative Plan:** If the plan you propose is rejected, you should have come up with alternatives to the change as described.

18. **Participative Provisions:** If the change is to be successfully introduced, then some provisions must be made to involve those who will be expected to implement the change or who will be affected by it. What have you done with regard to planning and decision making to ensure that this has been accomplished?

Note: A worksheet is provided on the next page that may facilitate the change analysis. This instrument should be used in conjunction with either the *Change Inventory for Leaders* or the *Inventory of Transformational Management Skills*. Remember, this instrument is useful to assess driving/restraining forces within either an individual, a team, or an organization.

Worksheet for Item 7

Analysis of Forces

Driving (D)

(List all the promoting forces *for* the change)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Resisting (R)

(List all the promoting forces *for* the change)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Checklist

In identifying the above sets of forces, did you list those that might be found under these headings? If you missed any, then note them under **D** or **R**.

- Goal/objectives problems
- Power/authority problems
- Communication problems
- Role/relationship problems
- Decision-making problems

Additions

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 6. Amherst, MA: HRD Press, Inc.

Harris, P. R., & Moran, R. T. (1993). *Managing cultural differences*, Chapters 5 and 9. Houston, TX: Gulf Publishing.

Part 2

Team Assessment

8 Group Maturity Analysis

PURPOSE:	To assist an observer to rate any group's behavior on ten aspects of group dynamics and to analyze the task and maintenance behaviors of group members.
DESCRIPTION:	This instrument consists of a rating scale of ten group behaviors and forms for functional analysis of individuals' task and maintenance behaviors. The form is designed to be used by an observer or group members following an actual group meeting.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of this instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Time required varies, depending on length and complexity of actual meeting.
APPLICATION:	<ul style="list-style-type: none">• Team Building• Organizational Improvement• Improving Effectiveness of Group Work/Meetings
SUITABLE FOR:	Ongoing work group at all levels.
SCORING:	Facilitators should tally up individual responses for group scores and percentages. Group or individual diagnosis should be made at different points in group's life cycle to compare group/individual growth in team skills.

Group Maturity Analysis

Instructions

Observe the group at work on its task. When it is completed, read each statement and circle the number closest to how you think the group acted as a whole.

This group...

1. Has adequate mechanisms for getting feedback.

Poor Feedback Mechanisms	1	2	3	4	5	Excellent Feedback Mechanisms
			Average			

2. Adequate decision-making procedure.

Poor Decision-making Procedure	1	2	3	4	5	Very Adequate Decision-making Procedure
			Average			

3. Feeling of togetherness.

Low Cohesion	1	2	3	4	5	Feeling of Togetherness
			Average			

4. Flexible organization and procedures.

Very Inflexible	1	2	3	4	5	Very Flexible
			Average			

5. Maximum use of member resources.

Poor Use of Resources	1	2	3	4	5	Excellent Use of Resources
			Average			

6. Clear communication.

Poor Communication	1	2	3	4	5	Excellent Communication
			Average			

7. Clear goals accepted by members.

Unclear Goals—Not Accepted	1	2	3	4	5	Very Clear Goals—Accepted
			Average			

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8. Feelings of interdependence (feel you can disagree) with authority persons.

No Interdependence	1	2	3	4	5	High Interdependence
			Average			

9. Shared participation in leadership functions.

No Shared Participation	1	2	3	4	5	High Shared Participation
			Average			

10. Acceptance of minority views and persons.

No Acceptance	1	2	3	4	5	High Acceptance
			Average			

Functional Analysis: Task Behavior

Instructions:

Write names of group members in the top row of the chart below. Make a check under the name of the person closest to acting out the items listed to the left. When the group has completed its work, the chart can give a picture of how each individual contributed to the group task.

Member Behavior Required for Doing Group Work	[Write names of group members in top row]				
1. Initiating: Proposing tasks or goals; defining a group problem; suggesting a procedure or ideas for solving a problem.					
2. Information or opinion seeking: Requesting facts; seeking relevant information about a group concern; asking for suggestions and ideas.					
3. Information or opinion giving: Offering facts; providing relevant information about group concern; stating a belief; giving suggestions or ideas.					
4. Clarifying or elaborating: Interpreting or reflecting ideas and suggestions; clearing up confusions; indicating alternatives and issues before the group; giving examples.					
5. Summarizing: Pulling together related ideas; restating suggestions after the group has discussed them; offering a decision or conclusion for the group to accept or reject.					

Functional Analysis: Maintenance Behavior

Instructions:

Write names of group members in the top row of the chart below. Make a check under the name of the person closest to acting out the items listed to the left. When the group has completed its work, the chart can give a picture of how each individual contributed to the group task.

Member Behavior Required for Building and Maintaining the Group as a Working Unit	[Write names of group members in top row]				
1. Encouraging: Being friendly, warm, and responsive to others; accepting others and their contributions; regarding others by giving them an opportunity or recognition.					
2. Expressing group feelings: Sensing feeling, mood, relationships within the group; sharing own feelings with other members.					
3. Harmonizing: Attempting to reconcile disagreements; reducing tensions by “pouring oil on troubled waters”; getting people to explore their differences.					
4. Compromising: When own idea or status is involved in a conflict, offering to compromise own position; admitting error, disciplining self to maintain group cohesion.					
5. Gatekeeping: Attempting to keep communication channels open; facilitating the participation of others; suggesting opportunity to discuss group problems.					

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 5. Amherst, MA: HRD Press, Inc.

9 Individual Behavior Analysis

PURPOSE:	To assess interpersonal performance in a team or group. To improve group performance.
DESCRIPTION:	This instrument measures the respondent's perception of his or her own or another's behavior in group meetings. Multi-level options include the subject's superior, subordinates, peers or others.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is based on thorough research. In the design of this instrument, every reasonable effort was made to ensure proper universe of content and simplicity of item wording.
ADMINISTRATION:	Self- or facilitator-administered. Requires 15 to 20 minutes.
APPLICATION:	<ul style="list-style-type: none"> • Team Building • Group Development
SUITABLE FOR:	Ongoing work group at any level
SCORING:	Individuals and group members should complete this analysis again 6 to 12 months after first taking it. Qualitative results should be compared to one's progress in behavior patterns over measured progress in a group's life cycle.

Note: This may also be used in conjunction with the next two instruments of Part 2 related to team performance and synergy. Just remember:

The Individual Behavior Analysis (IBA) is designed to help in the diagnosis of the level of a person's interpersonal performance skills within a work unit, team, or group. The range of inquiry goes from ascertaining the extent to which the individual helps others express their ideas in group communication to determining how conflict is managed. The inventory can be used for self-assessment or for evaluation of another. It is excellent as a self-improvement aid, for use during performance evaluation between a leader and a team member, or for group discussion during team building.

The premise upon which the instrument is based is that the quality of the interpersonal relationships within a team have a major impact on team effectiveness. In particular, there are three critical helping interpersonal qualities that are demonstrated by effective team members:

- **Accepting:** The team member manifests unconditional, positive regard of the other person's worth.
- **Authentic:** The team member is genuine in approach and does not play games at the expense of someone seeking help.
- **Empathetic:** The team member expresses understanding, is neutral, and places himself or herself in the other's life space.

How to Use It

The most effective way to use the IBA is in a multi-level format. In this way, the IBA is completed by three or four hierarchical levels within the organization: (1) self, (2) superior, (3) subordinate, (4) peer. In all cases, respondents are asked to describe the team behavior of a certain individual.

An excellent occasion to administer the IBA is either part way through a meeting, conference, or team activity or at the conclusion of these activities. Data obtained from the questionnaire can then be scored and fed back to participants in order to facilitate a constructive team building discussion and/or to critique relevant team behavior.

Scoring

A five-point rating scale is employed on 36 items in which the respondent is to choose the word that best describes the individual's performance: **always**, **often**, **occasionally**, **seldom**, or **never**. Items 10, 12, 18, and 22 are dysfunctional behaviors. **Always** or **Often** responses to these items suggest a need for improvement. The last three rating alternatives for all of the remaining items also indicate a possible need for improvement.

Individual item analysis is suggested. There is no overall score.

Individual Behavior Analysis (Team Member)

Group: _____ Date: _____

Name of person you are describing: _____

The person you are describing is: (check one)

- Myself
- My superior
- My subordinate
- My peer
- Other (please specify) _____

Instructions:

There are 36 descriptions of ways in which people participate in group meetings listed below. For each item, choose the alternative that comes closest to picturing how the person you are describing performs in meetings.

Answer the items by placing a check (✓) in the box in front of the alternative that best expresses your feelings about the item. Check only one alternative for each item.

Keep in mind that you are describing this person's behavior in meetings and how you have seen him or her perform in other settings.

1. Helps others express their ideas.

- Always
- Often
- Occasionally
- Seldom
- Never

2. Tries to understand the feelings (anger, impatience, rejection) that others in the group express.

- Always
- Often
- Occasionally
- Seldom
- Never

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3. Shows intelligence.

- Always
- Often
- Occasionally
- Seldom
- Never

4. Sympathizes with others when they have difficulties.

- Always
- Often
- Occasionally
- Seldom
- Never

5. Expresses ideas clearly and concisely.

- Always
- Often
- Occasionally
- Seldom
- Never

6. Expresses own feelings (for example, when he or she is angry, impatient, ignored).

- Always
- Often
- Occasionally
- Seldom
- Never

7. Is open to the ideas of others; looks for new ways to solve problems.

- Always
- Often
- Occasionally
- Seldom
- Never

8. Is tolerant and accepting of other people's feelings.

- Always
- Often
- Occasionally
- Seldom
- Never

9. Thinks quickly.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
10. Is angry or upset when things do not go his or her way.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
11. Is persuasive, a “seller of ideas.”
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
12. You can tell quickly when he or she likes or dislikes what others do or say.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
13. Listens and tries to use the ideas raised by others in the group.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
14. Helps others in the group express their feelings (for example, when they are irritated or upset).
- Always
 - Often
 - Occasionally
 - Seldom
 - Never

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15. Demonstrates high technical or professional competence.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
16. Is warm and friendly with those with whom he or she works.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
17. Is able to get the attention of others.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
18. Doesn't have a "poker face" front. Feelings are transparent.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
19. Is quick to adopt new ideas.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
20. Encourages others to talk about whatever is bothering them.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never

21. Comes up with good ideas.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
22. Pride is hurt when he/she feels he/she has not done his/her best.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
23. Pursues his or her points aggressively.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
24. You usually know where you stand with him or her.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
25. Encourages others to express their ideas before he or she acts.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never
26. Tries to help when others become angry or upset.
- Always
 - Often
 - Occasionally
 - Seldom
 - Never

20 Reproducible Assessment Instruments

27. Tries out new ideas.

- Always
- Often
- Occasionally
- Seldom
- Never

28. Is competitive. Likes to win and hates to lose.

- Always
- Often
- Occasionally
- Seldom
- Never

29. Presents ideas convincingly.

- Always
- Often
- Occasionally
- Seldom
- Never

30. Responds frankly and openly.

- Always
- Often
- Occasionally
- Seldom
- Never

31. Is willing to compromise or change.

- Always
- Often
- Occasionally
- Seldom
- Never

32. If others in the group become angry or upset, listens with understanding.

- Always
- Often
- Occasionally
- Seldom
- Never

33. Offers effective solutions to problems.

- Always
- Often
- Occasionally
- Seldom
- Never

34. Tends to be emotional.

- Always
- Often
- Occasionally
- Seldom
- Never

35. Talks in a way that others listen.

- Always
- Often
- Occasionally
- Seldom
- Never

36. When feelings run high, deals directly with them rather than changing the subject or smoothing the problem over.

- Always
- Often
- Occasionally
- Seldom
- Never

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapters 2 and 5. Amherst, MA: HRD Press, Inc.

10 Team Performance Survey

PURPOSE:	To be used in conjunction with team-building sessions, this instrument can be used alone or as a pre-/post-measurement of team skills. Members of a project team, task force, or work unit can individually assess their group on 25 items in terms of the extent that the performance of behavior occurs: yes, sometimes, no, or uncertain.
DESCRIPTION:	The range for evaluation goes from group goals, charter roles, and relationships to team collaboration, values, morale, and maintenance. A trainer or facilitator can then develop a four-column matrix based on individual scores. This tally of responses can help to identify the group's consensus on team strengths and weaknesses, as well as areas on which to work for improvement.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is based on the author's extensive research into group dynamics, as well as experience in team building.
ADMINISTRATION:	<p>May be used alone or in conjunction with two related inventories developed by Dr. Philip R. Harris, <i>Group Maturity Analysis</i> and <i>Team Synergy Analysis</i>.</p> <p>Team Performance Survey (TPS) can be used as a pre-/post-instrument for data gathering in conjunction with a team building session. Members of project teams or other work units can use the survey to evaluate a group's progress and problems from an individual perspective. Then the participants can compare their selection on the 25 items for further discussion, clarification, and learning.</p>
APPLICATION:	<ul style="list-style-type: none"> • Team Building and Development • Human Relations/Interpersonal Training
SUITABLE FOR:	<p>Team or Work Unit Members Staff Meeting Participants</p>
SCORING:	To record total group scores, a matrix can be drawn on a chalkboard or flipchart paper with four columns on which the headings or choices are written horizontally across the top: Yes, Sometimes, No, Uncertain. Then, vertically along the left side, insert the numbers 1 to 26. Each team member would then be invited to place his or her personal rating checks for all items on the display matrix for other

members to see. Trouble spots in team relations could then quickly be identified by tallying up the results for the group on each item.

For example, with reference to item #1, in a team of eight persons, if two of them marked **No** and six checked **Uncertain**, the majority indicate a consensus that the group's goals are uncertain. In this way, a leader and team can diagnose the health of the group's development and where improvement is desirable for increased performance.

Team Performance Survey

Instructions:

Please consider each item relative to a specific work team or unit with which you are associated (e.g., a project or product team or a task force).

Name of Group: _____ Date: _____

Please check (✓) each item that best describes your feelings or opinions about this group at this moment:

	Yes	Sometimes	No	Uncertain
1. This group's goal or mission is quite clear to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. The group's charter in terms of mandate, parameters, and timeframe is evident to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. My role and relationship to team members and other functional units are clearly understood by me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The team shares with me a sense of being accountable individually for the group's results.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. From my perspective, the material and human resources available to the group's tasks are adequate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. My competencies are sufficient to help this team accomplish its goal.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. In my opinion, this team lacks some members in the organization who are vital to its success.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. The team works well together and has cohesion.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. The members of this group do not feel free to level with one another, hiding true opinions and feelings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Some members of this team seem to be psychologically threatened or intimidated by me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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	Yes	Sometimes	No	Uncertain
11. To be effective, this group has to deal with the differences within it, instead of ignoring or smoothing over them for task accomplishment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. This group has the skills within it to deal effectively with its differences and disagreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. This group communicates at both the cognitive (I think) and affective (I feel) levels of interaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. This team provides individual support to members when needed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. This group regularly gives recognition and encouragement to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. This team facilitates member involvement and seeks their opinions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. This group fosters my participation and positively reinforces my contributions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. The leadership in this team is shared.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Members play a variety of roles in this group, and no one person dominates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. This group welcomes my input and feedback.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. This team is committed to cooperation and collaboration among members and with other groups.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. This group values competence and high performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. This team inspires my best effort.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Our members work well together.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. This team pauses occasionally from pursuit of its tasks to improve group maintenance and functioning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11 Team Synergy Analysis Inventory

PURPOSE:	To assess synergistic skills within a work team.
DESCRIPTION:	Respondents assess their own performance of 15 group behavior skills, behaviors, and characteristics that are essential for effective team performance.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of this instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 15 minutes.
APPLICATION:	<ul style="list-style-type: none"> • Team Building • Improvement of Group Performance
SUITABLE FOR:	Ongoing work groups of managers and professionals.
SCORING:	Not applicable.

Team Synergy Analysis Inventory

Instructions:

Please check (✓) the appropriate category.

Regarding my team participation...

1. I cooperate with my colleagues at work.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

2. I collaborate, whenever possible, with people from other disciplines, departments, and work units.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

3. I seek variety of input in problem solving and decision making from diverse sources.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

4. I realize the many interdependencies of technologists with others within the organization or the industry outside our field of specialization.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

5. I can function effectively as a member of a team or task force, especially when it is multidisciplinary.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

6. I am willing to consider issues from varied perspectives, even those very different from mine.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

With reference to organizational teams and their management...

7. I can tolerate ambiguity, uncertainty, and seeming lack of structure.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
8. I take an interest in each member's achievement, as well as the group as a whole.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
9. I am able to give and receive feedback in an objective, non-defensive manner.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
10. I encourage a team atmosphere that is informal, relaxed, comfortable, and nonjudgmental.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
11. I seek group participation, consensus, and shared decisions.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
12. I clarify team and member roles, responsibilities, relationships, and assignments or expectations.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
13. I have the capacity for establishing temporary, meaningful, and intense relations.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
14. I can facilitate group communication on goals, targets, and schedules.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
15. I synthesize diverse input, information, and insights.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

Note: You may wish to share your evaluation with a colleague or relative to ascertain if your assessment is confirmed or not. When you have identified areas of improvement, develop a strategy to increase your communication skills.

Recommended Reading

Harris, P. R., & Moran, R. T. (1992). *Managing cultural differences*, Chapters 7 and 12. Houston, TX: Gulf Publishing.

Moran, R. T., Stripp, W. G., & Harris, P. R. (1993). *Developing global organizations*, Chapter 3. Houston, TX: Gulf Publishing.

Part 3

New Management Concepts for Supervisors

12 High Performance Management Inventory (HPMI)

PURPOSE:	To assist managers seeking to ensure high performance in their role.
DESCRIPTION:	The <i>High Performance Management Inventory</i> has 104 items for self-evaluation or assessment by another. It is intended for those who aspire to be effective global managers. The inventory is a comprehensive review in 12 areas of leadership activities and responsibilities.
VALIDITY:	Face validity based on the author's extensive research in management practices and behaviors.
ADMINISTRATION:	This instrument can be self-administered.
APPLICATION:	<ul style="list-style-type: none">• Self-evaluation• Performance Evaluation
SUITABLE FOR:	Mid to upper levels of management.
SCORING:	The assessor simply adds up the total management proficiency ratings to ascertain whether the evaluation indicates basic, intermediate, or advanced competency. A rating on any item below 4 identifies areas for performance improvement.

High Performance Management Inventory (HPMI)

Directions:

This instrument is useful for assessing your own management competencies for high performance, and provides indicators for continuing professional development. The inventory can also be used for more objective performance appraisal when a supervisor or colleague employs it to evaluate your managerial proficiency. The comparison of ratings obtained between its administration by yourself and by others can provide valuable insights for further learning and growth as an effective global manager. Finally, HPMI can be used as an assessment instrument with those who report to you, or by project managers with team members.

HPMI helps identify one's professional management strengths, as well as where to focus efforts for career development. The evaluation utilizes a nine-point scale in which you rate yourself or another (or someone else rates you) from low to high proficiency. This is done by locating a place from left to right that best describes the current state of achievement and then recording that number for the item under consideration.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

This inventory is made up of 104 items that have been divided into 12 categories of management functions. These cover a range of activities and responsibilities of a manager in a leadership role. Review the following meaning of the classifications before beginning the rating process:

- 1. Cultural Awareness:** Being conscious of and up-to-date on organizational culture, policies, priorities, and power issues (microculture) in relation to external issues, trends, and development (macroculture—economic, political, social, technological conditions and trends).
- 2. Communication:** Internal organizational communications and information exchanges, such as keeping subordinates informed, interpreting work unit activities and priorities, information interface with other units.
- 3. Public Relations:** Work unit relations with the team's internal and external publics, or stakeholders in the team's professional activities; this involves representation of what the unit or team is doing to other managers or units within the organization, and to persons/groups outside in the community, industry, or government.

4. **Coordination:** Performing liaison functions and integrating work unit activities in order to create synergy with other organizational units or with externals such as suppliers, contractors, consultants, consumers, regulatory officials, etc.
5. **Planning:** Developing and deciding on long-term objectives/goals, strategies, and priorities; planning for change or alternative courses of action.
6. **Implementation:** Converting the above plans into short-term targets and activities by sequencing/scheduling and appropriate decision making.
7. **Financial Management:** Inaugurating and monitoring financial controls such as budgeting, which includes preparing, justifying, and administering funds invested in unit activities.
8. **Materials Resource Management:** Assuring availability of adequate raw materials and/or supplies, equipment, and facilities to carry on the unit's activities; overseeing procurement/contracting functions of the unit.
9. **Human Resources Management:** Projecting number/type of staff requirements for the unit, and effectively using the human resource development (HRD) systems of the organization or community for recruitment, selection, promotion, training, performance appraisal, and improvement.
10. **Supervision:** Providing continuous monitoring, guidance, and coaching of subordinates so that unit activities are accomplished, while recognizing and rewarding high performance, as well as correcting low productivity situations.
11. **Unit Monitoring and Scanning:** Keeping informed on overall status of unit culture and activities, identifying problem areas for corrective actions (e.g., rescheduling or relocating resources, using external consultants or resources); then being able to compare unit activity with performance or trends among comparable organizational units and industry or foreign competitors through environmental scanning and forecasting.
12. **General Performance Evaluation:** Action research to assess critically the degree to which the unit is achieving program/project goals and targets, as well as its overall effectiveness in work operations; also evaluation of miscellaneous practices of the manager that affect both personal and unit performance at home and abroad.

These are the 12 dimensions of management that, when performed very well, contribute to a high performing leader and work environment. Within the context of these defined categories, now proceed with the judgments. No one else will see these results unless you decide to share them. Remember, if you are to advance to your personal and professional development, or that of others, through this exercise, be discriminating and authentic in your ratings. Recall that you are assessing individual proficiency in a range of managerial activities and responsibilities relative to a work unit or team (project team, office, plant, branch, division, bureau, regional or national territory, subsidiary, etc.) that is the part or level of the organization that you (the individual under consideration) manages or supervises.

(If a colleague or supervisor is using this instrument to assess the performance of another person, follow the same procedure.)

Record the most appropriate rating from the 9-point scale on the blank space to the left of each numbered item. Thank you for your cooperation. Please begin the assessment process.

Scoring Procedure

1. Add up the ratings provided for the 104 items.
2. Determine an overall evaluation of high performance management proficiency by comparing the total score with these approximations—a score between 210 to 315 would indicate basic competency; between 420 and 630 would be intermediate competency; and between 635 and 945 would be advanced competency.
3. Go back and analyze the implications of any individual item scores rated below 4—such items are targets for immediate improvement. Those with ratings in the 5 to 6 range would be secondary targets for professional development if one aspired to become a high performing manager.
4. Observe the ratings within each of the 12 parts. Any selection with a preponderance of scores in the 2 to 6 range would seem to be an area to focus on for further career development.
5. If one's supervisor or a colleague were asked to provide a more objective performance appraisal of you using the 104 items, then compare the total score supplied by that observer in contrast to one obtained through self-evaluation. Furthermore, note discrepancies in scores for individual items and categories. A conference with that observer on such matters may offer additional self-knowledge and career guidance.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

Part I: Cultural Awareness

- _____ 1. Involved in the transition to the new work culture for myself and my unit by planning change.
- _____ 2. Keep up-to-date on the socioeconomic developments that affect my work unit.
- _____ 3. Keep up-to-date with technological changes and developments affecting area of expertise for myself and the work unit.
- _____ 4. Keep aware of changes in corporate or organizational culture.
- _____ 5. Keep up-to-date on changing organizational objectives, roles, norms, activities, priorities, and politics.
- _____ 6. Develop a strong work unit or team culture that enhances high performance and excellence.
- _____ 7. Aware of and sensitive to the varied cultures, both macro and micro, in which the unit operates.
- _____ 8. Develop cultural empathy/sensitivity to difference in unit members/colleagues, customers/clients, contractors/suppliers.
- _____ 9. Have knowledge and language skills for the host culture in which the unit operates.
- _____ 10. Apply understanding of roles, expectations, or regulations relative to unit performance from the perspective of officials in this organization, its unions, its industry association, or the government.

Part II: Communication

- _____ 11. Explain/clarify changing organizational culture, policies, priorities, and procedures to unit members.
- _____ 12. Extract and apply organizational communications pertinent to unit members (e.g., information and directive from higher management).
- _____ 13. Keep unit members informed of pertinent external issues and developments that impact their work.
- _____ 14. Ensure that work unit activities reflect organizational goals, policies, and directives.
- _____ 15. Prepare required written and oral communications for unit with conciseness, accuracy, competence, and cultural sensitivity.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

- _____ 16. Communicate respect for the recipient/listener by transmitting both verbally and nonverbally positive concern, interest, and encouragement, especially by trying to get into the receiver’s world or life space.
- _____ 17. Communicate reciprocal concern and nonjudgmental attitude by a dialogue that shares interaction responsibility, promotes circular communication, and avoids moralistic, value-laden, evaluative statements.
- _____ 18. Communicate flexibility and capacity to tolerate ambiguity by adjustments to the receiver’s mind-set and needs, as well as being able to cope with cultural differences and uncertainties.

Part III: Public Relations

- _____ 19. Identify work unit’s diverse publics or stakeholders in its activities and performance.
- _____ 20. Represent/promote work unit before groups and individuals within and outside of the organization.
- _____ 21. Respond effectively to inquiries and requests for unit information and service.
- _____ 22. Explain work unit programs and functions to non-experts in terms they can understand and that are culturally appropriate.
- _____ 23. Persuade other interested parties to “buy into” and support a desired course of unit action.
- _____ 24. Use formal and informal resource networks effectively to achieve unit objectives and targets, or to obtain information.
- _____ 25. Resolve conflict within unit or with other units by negotiation and compromise so that energies can be constructively channeled.
- _____ 26. Develop positive unit image for performance excellence, resourcefulness, and cooperation.
- _____ 27. Create unit reputation for innovation and adaptability to varied circumstances, results that are usually on time and within budget, and synergistic relationships.
- _____ 28. Demonstrate unit respect for host country or area locals, culture, and work habits.
- _____ 29. Maintain concern for environmental or ecological impact of unit activities.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

Part IV: Coordination

- _____ 30. Maintain helpful, supportive, productive relationships within the work unit.
- _____ 31. Maintain influential relationships with other units within the organization, obtaining cooperation from those not under direct control.
- _____ 32. Maintain productive working relationships with other units within the organization, obtaining cooperation from those not under direct control.
- _____ 33. Maintain productive working relationships with other companies within the industry (or other agencies within government if in public sector).
- _____ 34. Maintain effective community relations with other pertinent organizations and government bodies within the area.
- _____ 35. Keep higher-level management informed in a timely and relevant manner of unit developments and of significant information obtained from the above contacts.

Part V: Planning

- _____ 36. Utilize established dynamic planning techniques, environmental scanning, technological forecasting, or even future studies to develop unit goals with other members and higher levels of management.
- _____ 37. Establish a balance among competing objectives and targets to accomplish overall work unit goals.
- _____ 38. Assess technical feasibility for alternative courses of action.
- _____ 39. Assess financial feasibility for alternative courses of action.
- _____ 40. Assess sociopolitical feasibility for alternative courses of action.
- _____ 41. Anticipate obstacles for achieving work unit goals, identify means for overcoming them, and applying contingency plans when necessary.
- _____ 42. Plan specifically for changes, adjusting long-term work unit goals accordingly.
- _____ 43. Maintain a balance between needs/goals of specialized or unit interests and larger organizational mission.

0	1	2	3	4	5	6	7	8	9
No			Basic			Intermediate			Advanced
Competency			Competency			Competency			Competency

Part VI: Implementation

- _____ 44. Identify specific projects and actions necessary to accomplish work unit goals.
- _____ 45. Establish priorities among competing unit projects and activities.
- _____ 46. Set challenging but realistic deadlines for completing work unit projects.
- _____ 47. Sequence and schedule work activities to maximize efficient use of available resources.
- _____ 48. Consider long-term goals while devising short-term plans and schedules.
- _____ 49. Provide unit guidance on how to assess or measure goal accomplishments.

Part VII: Financial Management

- _____ 50. Prepare unit budget with members in context of organizational constraints and financial resources.
- _____ 51. Project long-term financial needs and resources of work unit.
- _____ 52. Explain and justify persuasively the unit budget requests both orally and in writing.
- _____ 53. Apply financial systems reports and mechanisms in managing work unit costs and/or income.
- _____ 54. Seek entrepreneurial opportunities to supplement unit budget or expand its income production.
- _____ 55. Consider national or community financial situation relative to pricing and compensation recommendations, expenditures, and contributions, as well as other manifestations of unit social responsibility.
- _____ 56. Consider return on investment in unit activities, especially if in the private sector and stockholder dividends are involved or loans are to be repaid.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

Part VIII: Materials Resource Management

- _____ 57. Plan for the acquisition of needed equipment, facilities, supplies, or services to carry out the unit's mission.
- _____ 58. Apply organizational contract and procurement rules and regulations in managing work unit.
- _____ 59. Oversee or participate in procurement management of key unit material resources, including lease or purchase decisions on equipment and contractors.
- _____ 60. Oversee or participate in managing and evaluating contractor or supplier activities for the unit.
- _____ 61. Ensure that local and minority contractors or suppliers are given equal opportunity for unit business.
- _____ 62. Ensure that illegal, unethical, or unjust financial practices are not practiced within or by the work unit.

Part IX: Human Resources Management

- _____ 63. Plan for needed changes in size and composition of work unit staff and supplementary personnel.
- _____ 64. Take an active role in recruiting, selecting, and retaining staff for the work unit.
- _____ 65. Seek and maintain competence as the performance criteria, regardless of sex, race, or other factors in worker's background.
- _____ 66. Apply personnel policies and regulations, particularly regarding equal employment opportunity and affirmative action to prevent job discrimination.
- _____ 67. Seek synergistic labor/management relations and high performing work culture that enhances people's potential.
- _____ 68. Develop meaningful performance standards and conduct helpful performance appraisals.
- _____ 69. Capitalize on human assets by appropriate training and development programs, especially in new technologies.
- _____ 70. Take corrective and constructive actions with work unit members whose behavior or performance is inappropriate.
- _____ 71. Consult with unit members and higher management for meaningful reward and recognition program.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

Part X: Supervision

- _____ 72. Clarify roles and relationships so that all unit members understand work assignments and expectations.
- _____ 73. Encourage participative and team management approach.
- _____ 74. Delegate responsibility with commensurate authority and resources.
- _____ 75. Provide positive reinforcement for high performance through appropriate recognition and rewards.
- _____ 76. Coach and counsel unit members on technical problems, productivity, career development, and appropriate changes in performance or behavior.
- _____ 77. Maintain equal concern for task accomplishment and people maintenance within the unit.

Part XI: Unit Monitoring and Scanning

- _____ 78. Establish systems for monitoring work progress in order to ensure unit excellence.
- _____ 79. Adjust to changes in workload, resources, priorities, or schedule in dynamic and timely manner.
- _____ 80. Use cooperative relations, direct observation, or informal contacts with general management, users, customers, and suppliers to ascertain needs and unit effectiveness—manage by walking or moving around and staying in touch with unit publics.
- _____ 81. Anticipate trends, changes, needs, and problems, readjusting and reallocating as appropriate.
- _____ 82. Encourage innovation and entrepreneurial spirit within the work unit and especially in relation to externals.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

Part XII: General Performance Evaluation

A. UNIT ASSESSMENT

- _____ 83. Evaluate unit effectiveness in a systematic and objective manner, emphasizing both quantity and quality.
- _____ 84. Assess unit climate in terms of cooperative actions that enhance people performance and potential.
- _____ 85. Identify specific ways for improving unit's procedures, processes, structures, and cost-effectiveness.
- _____ 86. Identify specific ways for improving the unit's culture, morale, relationships, and achievement level.
- _____ 87. Develop strategies toward achieving unit long-term goals by continuing system refinements and improvements.
- _____ 88. Utilize individual member performance appraisals and input as means for improving unit productivity and excellence.

B. PERSONAL ASSESSMENT

- _____ 89. Evaluate personal effectiveness as a unit manager in a systematic, objective, and periodic manner in order to identify strengths, limitations, and plans for improvement.
- _____ 90. Conduct unit meetings to achieve desired objectives by improved skills as a facilitator.
- _____ 91. Present ideas clearly and persuasively in both oral and written communication by improved skills as a communicator.
- _____ 92. Share helpful feedback with members by improved skills as a listener, observer, and constructive critic.
- _____ 93. Practice diplomacy, tact, and consideration of others by improved human relations skills.
- _____ 94. Practice leadership in a results-oriented and proactive, rather than reactive, way by improved planning change and strategist skills.
- _____ 95. Take responsibility, exercise initiative, and seize opportunity by improved entrepreneurial skills.

0	1	2	3	4	5	6	7	8	9
No Competency			Basic Competency			Intermediate Competency			Advanced Competency

- _____ 96. Manage information resources for wider input and applications by improved skills in communication technologies and informal networking.
- _____ 97. Exercise power by influencing others to get things done through improved skills in negotiations, bargaining, and coalition building.
- _____ 98. Apply imagination and creativity by improving problem-solving and decision-making skills.
- _____ 99. Implement and sustain a wellness program that reduces stress and tension while improving the quality of life and the management of time and leisure.
- _____ 100. Manage for transition, ambiguity, uncertainty, and differences by improved transformational management skills.
- _____ 101. Act to personalize knowledge and perceptions by improved cross-cultural management skills in order to recognize the influence of your own culture on your values, perceptions, attitudes, communications, and management practices.
- _____ 102. Endeavor to function in the industrial or technological work culture by improving technical skills and scientific comprehension.
- _____ 103. Endeavor to function in global economy and marketplace by improving skills and understanding the international economics, global regional markets, international management and business protocol, foreign languages.
- _____ 104. Practice synergy by improving skill development in cooperative and collaborative actions, cultural sensitivity and open-mindedness, team building, and joint ventures.

_____ **TOTAL SCORE**

Recommended Reading

Harris, P. R. (1994). *High performance leadership*, Chapter 1. Amherst, MA: HRD Press, Inc.

13 Management Communications Inventory

PURPOSE:	To help appraise communication skills necessary for management effectiveness. To provide information that will contribute to development of a strategy for improvement.
DESCRIPTION:	The instrument measures perception of communication skills on 21 items, including verbal and nonverbal skills, empathy, and feedback.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of the instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 10 minutes.
APPLICATION:	Communication Assessment/Improvement
SUITABLE FOR:	All levels
SCORING:	Not applicable

Management Communications Inventory

Here is a checklist for an appraisal of yourself as a communicator. Place a check (✓) next to the category that best describes your present approach to the communication process.

You may wish to share your evaluation with a colleague or relative to ascertain if your assessment is confirmed or not. When you have identified areas of improvement, develop a strategy to increase your communication skills.

1. In communicating, I project a positive image of myself (e.g., voice, bearing, appearance, etc.).
 Seldom Often
 Occasionally Always

2. I try to understand and enter into the receiver's frame of reference (e.g., empathetic, restate his point of view, etc.).
 Seldom Often
 Occasionally Always

3. I establish eye contact with the receiver.
 Seldom Often
 Occasionally Always

4. I communicate respect for the receiver of my message (e.g., listening carefully, not making him or her feel inferior, etc.).
 Seldom Often
 Occasionally Always

5. I use as many media as necessary to get my meaning across (e.g., communication symbols that appeal to several senses).
 Seldom Often
 Occasionally Always

6. I am aware of my own inner state that conditions my communication (e.g., feelings, needs, motives, assumptions, prejudices, etc.).
 Seldom Often
 Occasionally Always

20 Reproducible Assessment Instruments

7. I try not to let emotionally loaded words used by the other person distort my responses.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
8. I try to listen not only to facts and ideas (cognitive data), but to the feelings that the other person reveals.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
9. I try to be open to new ideas and constructive criticism regardless of the source.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
10. I am willing to share with the other person about personal change if it is warranted.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
11. I try to be authentic in my communication and level with others when it is appropriate.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
12. I try to reduce the physical and psychological distance between me and my listeners.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
13. I check to ascertain if my real meaning is understood.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
14. I allow the other person to ask questions and seek clarification regarding my message-sending.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |
15. I ask questions and seek clarification during the communication exchange.
- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

16. In speaking, I try to project my voice clearly.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

17. In speaking, I try to vary the tone of my voice.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

18. In speaking, I try to say what I really mean.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

19. In speaking, I try to use a vocabulary that is understandable to the receiver.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

20. In speaking, I try to be concise.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

21. I follow up on the communication to see if agreements or instructions are carried out.

- | | |
|---------------------------------------|---------------------------------|
| <input type="checkbox"/> Seldom | <input type="checkbox"/> Often |
| <input type="checkbox"/> Occasionally | <input type="checkbox"/> Always |

Participant's Initials

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapter 3. Amherst, MA: HRD Press, Inc.

Simons, G. F., Vazquez, C., & Harris, P. R. (1993). *Transcultural leadership*, Chapters 3 and 4. Houston, TX: Gulf Publishing.

14 Managing People Skills Inventory

PURPOSE:	To assess the people skills and their impact on productivity of management.
DESCRIPTION:	Twenty-four key questions are raised concerning people skills—the behavioral science management concerns that complement technical proficiency of managers. A 5-point rating scale is utilized for assessment ratings that range from poor to excellent.
VALIDITY:	Face validity based on the author’s extensive research in management practices and behaviors.
ADMINISTRATION:	This rating instrument can be quickly used on oneself or by another colleague or subordinate.
APPLICATION:	This inventory is supplementary to the <i>High Performance Management Inventory</i> .
SUITABLE FOR:	Mid to upper levels of management.
SCORING:	The totaling of ratings permits assessment in three categories—need for improvement, average, and high performance.

Managing People Skills Inventory

Instructions:

For yourself or a colleague, use a 5-point scale to evaluate one's effectiveness as a leader in the human relations competencies at work. For each item, rate the manager by writing the number in the column at the right that best describes his or her present performance or behavior at work:

5 = Excellent 4 = Good 3 = Average 2 = Inadequate 1 = Poor

The manager being assessed is (check one):

- Myself
- My subordinate named _____
- My colleague named _____

* * * * *

Since we strive to be learning managers concerned about high performance on the job, I rate this person as follows:

- | | Rating |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| 1. Possesses and practices a positive management philosophy regarding people. | _____ |
| 2. Is a behavior model to workers of the desired attitudes and performance on the job. | _____ |
| 3. Is innovative in dealing with people, being quite open-minded and flexible. | _____ |
| 4. Is sensitive to people and opportunities around him or her. | _____ |
| 5. Is positive and encouraging with personnel—not given to falling back on negative statements (e.g., “It can’t be done,” “It’s never been done before,” “It’s not the way we do things around here”). | _____ |
| 6. Is aware of the differences in people, capitalizing on their uniqueness. | _____ |
| 7. Understands the influence of culture on individuals and institutions, but is able to change it or move beyond. | _____ |
| 8. Is results, not task, oriented—places emphasis on accomplishments and rewarding performance. | _____ |
| 9. Is goal oriented, with self and subordinates—sets realistic objectives, targets, and deadlines. | _____ |

20 Reproducible Assessment Instruments

- 10. Maintains high performance standards—values, competence, professionalism, and measurable growth. _____
- 11. Operates on the principles of expect/inspect—each employee reporting to him or her comprehends the job expectations, is encouraged to ask questions, but is held accountable to achieve measurable standards. _____
- 12. Provides performance leadership by dynamic achievements, inspiring personnel to stretch and achieve their potential. _____
- 13. Trusts people by delegating, giving them freedom to perform in their own unique way, thus building self-reliance. _____
- 14. Fosters reasonable risk taking and creativity in others. _____
- 15. Reinforces cooperation and collaboration, rather than interpersonal or intergroup competition. _____
- 16. Seeks continually to learn, even from failure—promotes personal and career development for self and others. _____
- 17. Endeavors to capitalize on human assets, helping people experience success and results. _____
- 18. Searches to understand his or her own as well as others' needs and attempts to satisfy them through work. _____
- 19. Believes in positive reinforcement, so confirms people's self-concept when it is healthy or assists them to gain a strong sense of personal identity and confidence. _____
- 20. Enables people to gain control over their work space, thus sharing in the exercise of power. _____
- 21. Communicates authentically with co-workers, customers, and suppliers, giving and receiving appropriate feedback. _____
- 22. Provides recognitions and rewards customized to the individual worker's needs and values. _____
- 23. Arranges for training opportunities for employees so that performance may be improved or new skills acquired. _____
- 24. Manages conflict constructively and acts as a facilitator. _____

TOTAL RATINGS: _____

Note: Tally up the rating scores and write the total in the space provided. A high performing manager would gain a score of 100 or more; an average manager would obtain ratings of 75+, indicating a need for gradual improvement. Scores below that level should raise questions about this person's suitability for management. In developing goals for performance improvement, go back over the items for which a score of 3 or less was recorded. If this was a self-evaluation, you might ask a supervisor or colleague to rate you, and then compare the assessment on each of the 24 items.

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapter 2. Amherst, MA: HRD Press, Inc.

Simons, G. F., Vazquez, C., and Harris, P. R. (1993). *Transcultural leadership*, Chapters 5, 6, and 7. Houston, TX: Gulf Publishing.

15 Intercultural Relations Inventory (IRI)

PURPOSE:	To examine differences between the respondent's culture and a foreign culture or between the respondent's and a subordinate's microculture. To increase cultural awareness and sensitivity.
DESCRIPTION:	Respondents contrast ten aspects of their own culture and that of another culture.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of the instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 15 minutes.
APPLICATION:	<ul style="list-style-type: none"> • Intercultural Awareness/Training • Preparation for Overseas Assignment
SUITABLE FOR:	<p>Form A: Managers and professional employees who interact with people from foreign cultures.</p> <p>Form B: Supervisors with subordinates from a different microculture.</p>
SCORING:	There is no formal scoring for the IRI because this is a learning analysis instrument for sharing individual perceptions about a cultural group. The exercise should stimulate not only cultural awareness, but also promote inquiry into cultural specifics by questioning or further study.

Intercultural Relations Inventory

Form A

Directions: Take about 5 minutes to note your observations on the items below in view of the situation presented. Then, share your insights with your group members and try to arrive at some consensus.

Situation: You are a representative of a U.S. corporation abroad. You are in the process of developing a contract with a representative of a company in another nation to produce your products or services for that country. Your firm is to provide basic guidelines and parts for your copyrighted product/service; the assembly and delivery is to be done by your foreign counterpart for his people. Assume that the other country is: (a) in Latin America, such as Mexico or Brazil, or (b) in Asia, such as Japan or Indonesia, or (c) in Europe, such as France or Hungary.

Indicate the national or cultural group whose behavior you will be comparing: _____

Contrast your culture with the other in terms of the categories below. List briefly some of the characteristics of each to be considered in this new business relationship. Use the back side of this form, if necessary.

Foreign Culture

I. Communication style (nonverbal and verbal, as well as the language of business):

II. Food and diet:

III. Clothing (especially business dress):

IV. Time sense:

V. Values and business ethics:

VI. Work habits and practices:

VII. Attitudes/practices with “minority” workers (sex, class, caste, color, etc.):

VIII. Family and marriage:

IX. Other customs, traditions, and beliefs:

X. What problems or challenges do you see in this business relationship because of some of the differences that you have noted above?

U.S. Culture

I. Communication style (nonverbal and verbal, as well as the language of business):

II. Food and diet:

III. Clothing (especially business dress):

IV. Time sense:

V. Values and business ethics:

VI. Work habits and practices:

VII. Attitudes/practices with “minority” workers (sex, class, caste, color, etc.):

VIII. Family and marriage:

IX. Other customs, traditions, and beliefs:

X. What problems or challenges do you see in this business relationship because of some of the differences that you have noted above?

Finally, what problems or challenges do you see in your work relationship with this person because of some of the differences that you have identified?

1) _____

2) _____

What educational or information differences do you see between you and this co-worker?

Supervisor/Worker Relations

Form B

Directions: This exercise requires three steps:

1. Note your observations on the items below in view of the situation presented by filling in the blank spaces with appropriate information.
2. Share this data with your fellow group members and try to arrive at some consensus with your combined observations.
3. Report your group findings on newsprint paper with the marking pencils provided to your group.

Situation: Choose either A or B for your reporting. **You are a supervisor of:** (a) a minority group member from any ethnic group you wish to select (black, Chicano, Asian, Filipino, etc.) **or** (b) a young worker under 21 years of age.

This person represents a “micro” culture within U.S. society; he is different from you in his background, attitudes, and perceptions. Try to place yourself in his “life space” or “private world” and report how he may act or feel in regard to the categories described below. Try to record the *differences* in viewpoint you might expect from this worker. The top of the following page should be used for this purpose. When you have finished recording your observations about *his* outlook, then use the section entitled Supervisor’s Cultural Background to list the contrasting viewpoint *you* hold that might affect your relationship.

Indicate your selection as to *which group* you have selected in A or B for your observations:

Worker is: _____

Micro Culture Background (his/her)

- | | |
|-------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| I. Communication style (nonverbal and verbal, as well as the language of business):

_____ | V. Values and business ethics:

_____ |
| II. Clothing at business or work:

_____ | VI. Sense of time attention span:

_____ |
| III. Appearance at business or work (hair, beard, etc.):

_____ | VII. Food and diet:

_____ |
| IV. Work habits and attitudes:

_____ | VIII. Other customs, traditions, or beliefs that might affect the relationship:

_____ |

Supervisor's Cultural Background (you)

- | | |
|-------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| I. Communication style (nonverbal and verbal, as well as the language of business):

_____ | V. Values and business ethics:

_____ |
| II. Clothing at business or work:

_____ | VI. Sense of time attention span:

_____ |
| III. Appearance at business or work (hair, beard, etc.):

_____ | VII. Food and diet:

_____ |
| IV. Work habits and attitudes:

_____ | VIII. Other customs, traditions, or beliefs that might affect the relationship:

_____ |

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapter 4. Amherst, MA: HRD Press, Inc.

Harris, P. R., & Moran, R. T. (1993). *Managing cultural differences*. Houston, TX: Gulf Publishing.

Elashmawi, F., & Harris, P. R. (1993). *Multicultural management*. Houston, TX: Gulf Publishing.

Simons, G. F., Vazquez, C., & Harris, P. R. (1993). *Transcultural leadership*, Chapters 5, 6, and 7. Houston, TX: Gulf Publishing.

16 Inventory of Transformational Management Skills

PURPOSE:	To assess the perceived effectiveness of management and leadership skills necessary for managers in transition.
DESCRIPTION:	This is a 24-item assessment instrument that uses a 5-point scale to rate an individual's effectiveness in four areas: leadership style, change skills, communication skills, and managerial performance. It can be used in appraisal of oneself or another, and is best used as a multilevel assessment instrument.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is based on thorough research of leadership and change management. In the design of the instrument, every reasonable effort was made to ensure proper universe of content and simplicity of item wording.
ADMINISTRATION:	Self- or facilitator-administered. Requires about 15 minutes. Multi-level option.
APPLICATION:	<ul style="list-style-type: none"> • Performance Appraisal • Developmental Coaching • Training Needs Analysis
SUITABLE FOR:	Middle through upper management.
SCORING:	A score of 120 to 150 indicates effective management practices.

Inventory of Transformational Management Skills

Note: This assessment instrument is divided into four parts and can be used for self-appraisal or evaluation of another person. On each item, please assess the manager on a scale of 1 to 5. Consider that a rating of 1 would be the lowest score, indicating that the person never or rarely engages in this behavior; 3 would be average or usually; and 5 would be the highest—always or excellent. Place your choice of number in the **Effectiveness Rating** column.

This Manager Is...

(Part I: Leadership Style)

**Effectiveness
Rating**

- | | |
|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| _____ | 1. Open Minded: Willing to consider new ideas and approaches as well as people of different opinions, perspectives, cultures. |
| _____ | 2. Flexible: Adaptable to new people, situations, developments, information, or ways of doing things (processes). |
| _____ | 3. Sensitive: Conscious of what's happening to oneself and others; is person-centered and aware of needs and feelings of people; able to respond to others empathetically. |
| _____ | 4. Creative: Responds with resourcefulness to new people, situations, and data; exercises initiative, imagination, and innovation. |
| _____ | 5. Synergistic: Given to cooperation and collaboration with colleagues; encourages teamwork and group participation. |
| _____ | 6. Facilitative: Exercises coaching, counseling, and negotiating skills; exercises knowledge and skill in group process. |

(Part II: Change Skills)

**Effectiveness
Rating**

-
-
-
-
-
-
-
-
- 7. **Ultrastability:** Perceives relativeness of experiences and does not seek absolutes; can cope with change, ambiguity, and uncertainty.
 - 8. **Temporariness:** Capacity to establish intense, ad-hoc relationships that are meaningful; able to deal with transience and mobility.
 - 9. **Tentativeness:** Re-evaluates one's image, values, role, goals, and life-style on basis of new insights and information.
 - 10. **Analytical:** Capable of analyzing the driving and resisting forces for and against a change; the change impacts on the organization's future.
 - 11. **Balanced:** Exercises evenhandedness and understanding on the rate or pace of change introduced into the organization so that it is neither too radical or disruptive; plans for change.
 - 12. **Strategic:** Capable of strengthening the driving forces for a change and overcoming the restraining forces; can communicate the case for change and employ a variety of support strategies.

(Part III: Communication Skills)

**Effectiveness
Rating**

-
-
-
-
-
-
-
-
- 13. **Positive Image:** Projects a positive image of self and role, in body language and appearance, as well as verbally and nonverbally; indicates congruence or comfort with self so as to inspire confidence in this person.
 - 14. **Understanding:** Demonstrates that he or she listens, is trying to enter into the speaker's frame of reference, and is respectful.
 - 15. **Media Savvy:** Uses as many media as feasible to transmit messages effectively, appealing to multiple senses and powers in receiver.
 - 16. **Astuteness:** Avoids stereotyping, emotionally loaded words, and communication barriers while striving to ascertain real meanings behind messages and allowing for clarifications.
 - 17. **Authentic:** Avoids vagueness and game-playing, while leveling with others as appropriate; usually tells it like it is.
 - 18. **Information professionalism** demonstrated by:
 - a) Selectivity in information sources and contact use;

- _____ b) Use of others for information scanning, or to supplement his or her own knowledge;
- _____ c) Disseminates information to organization and subordinates appropriately.
- _____ d) Balanced in terms of information collecting and taking actions based on the data;
- _____ e) Informed sufficiently for passing judgments, making decisions, or giving authorizations;
- _____ f) Follows up on communications to see whether agreement or instructions are carried out;
- _____ g) Meeting effectiveness in number and manner of group sessions.

(Part IV: Managerial Performance)

**Effectiveness
Rating**

- _____ 19. **Relationships:** Aware of importance of organizational relations and cultivates them both internally and externally; spends appropriate amount of time in linking up with right persons who affect morale and performance; capable of networking.
- _____ 20. **Planning Ability:** Translates mental plans into written targets, goals, strategies, and actions; maintains long-term perspectives without neglecting short-term concerns.
- _____ 21. **Time Management:** Maintains systematic scheduling for appropriate mix of activities to fulfill role; efficient in use of special times of day or week for particular kinds of work; paces self and balances workload while avoiding fragmentation and excessive interruptions.
- _____ 22. **Stress Management:** Blends personal rights and needs with duties and obligation; promotes personal wellness through diet, exercise, and healthy lifestyle; reflects, studies, and reads appropriately.
- _____ 23. **Personally Involved:** Gets around the organization to find out what people are thinking and to observe activity first-hand rather than being remote and detached; encourages same approach with customers.
- _____ 24. **Team Management:** Functions effectively as a member of a team task force, while encouraging group participation in problem solving and decision making; shares power.

Scoring Note: The ratings on the above 24 appraisals can be tallied. For effective managers, the total by individual should be in the range of 120 to 150. If one is compiling results from a group evaluation, then total all the individual scores and divide by the number of assessors. For example, if 12 persons were evaluating the manager, then a score of 1,440 to 1,800 on this instrument would indicate a high performing manager.

* * * * *

Political scientist James MacGregor Burns maintained that a true leader senses and transforms the needs of followers. He envisioned subordinates or followers as having different levels of needs, and that the leader motivates and mobilizes these persons toward higher needs or consciousness. Transformational managers energize themselves and others, arousing hopes, aspirations, and expectations, as well as translating these into constructive actions. Transformational managers provide a behavior model, then inspire others to achieve something beyond the status quo or present activity. Transformational managers sense the capacity in others, and then help these persons to actualize their potential. Transformational managers sense when it is time for change, and then encourage and support others to accomplish the new and the different, the unique and exceptional. Transformational managers have vision, and share their dreams with others.

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapter 6. Amherst, MA: HRD Press, Inc.

Moran, R. T., Harris, P. R., & Stripp, W. G. (1993). *Developing global organizations*. Houston, TX: Gulf Publishing.

Part 4

Organizational Assessment

17 Organizational Culture Survey

PURPOSE:	To assess employees' perceptions of an organization's culture.
DESCRIPTION:	This instrument helps to measure an organization's culture in seven areas: overall effectiveness, organizational communication, evaluation of top management, assessment of the individual's work team, self-perception, organizational relations, and organizational change. Respondents utilize a 7-point scale to indicate their perceptions on 99 items.
VALIDITY:	The construct covered by this instrument is based on thorough research of the literature on organizational assessment and development. In the design of this instrument, every reasonable effort was made to ensure proper universe of content and simplicity of wording.
ADMINISTRATION:	Self- or facilitator-administered. Requires 20 to 50 minutes.
APPLICATION:	Organization Assessment/Development
SUITABLE FOR:	All management levels
SCORING:	Individual item/set content analysis recommended. Compilations of group responses can be converted into percentages for trend indication of employee analysis on response by section or for the total.

Organizational Culture Survey

Instructions:

This questionnaire should be as complete and authentic as possible. It provides you with an opportunity to:

- Give feedback *anonymously* to foster your organization's development
- Evaluate its key management, including yourself
- Understand better your organizational environment, whether at home or abroad

There are seven major sections to this inquiry and a total of 99 items seeking your opinion. A maximum of 50 minutes should be allowed for thoughtful completion of this inventory. Please consider your answers carefully for each point. Your first effort at responding should reflect your spontaneous reactions and thoughts on how you view your organization's culture from your position; if time permits, review your replies and make changes if necessary.

Please check the appropriate categories that best depict your response to the inquiry. Where necessary, *fill in* the information requested.

This analysis will be for the total organization ()
 or for the subsystem of which you are a part ()
 (e.g., division, department, subsidiary)

The majority of items are to be completed by making a check (✓) in one column in a 7-point scale, with the lowest evaluations on the left or low side of the continuum, average in the middle area, and higher assessments on the right side. The exceptions are items 23 and 68 through 81, which require checking the appropriate category provided.

Organizational Diagnosis

On a scale of *lowest* (1) to *highest* (7), place a check (✓) in the box indicating your organization's effectiveness or ineffectiveness on the following items. On question 23, check the appropriate category for your response.

Overall Analysis...

	Effectiveness						
	1	2	3	4	5	6	7
1. The goals/objectives of this organization are clearly defined and regularly reviewed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Managers and supervisors at all levels have the opportunity to participate in this process of setting goals/objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The organization has mechanisms for periodic evaluation of its achievement of goals/objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Key management devotes adequate time to advanced, dynamic planning and involves subordinates in the process as appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Key management in this organization supports high achievers among employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Management regularly reviews the assignment of roles and responsibilities, as well as the delegation of authority for performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Key managers ensure that adequate personnel development and training are available for employees to carry out assigned tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Management has an adequate system for regular and meaningful performance evaluation of employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. The organization emphasizes cooperation as an operational norm.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. The organization demonstrates commitment to providing satisfactory service to its clients/customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. The organization utilizes well the human energies of its work force.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. The organization rewards personnel on the basis of merit and performance, encouraging competence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Effectiveness						
	1	2	3	4	5	6	7
13. The work climate encourages employees to do their best and perform well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. The atmosphere in the organization encourages people to be open and candid with management.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. The organization treats employees equally, regardless of their sex or race.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Organizational Communication...

	Effectiveness						
	1	2	3	4	5	6	7
16. Are you satisfied with the present state of organizational communications?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Do you think the communication between management and yourself is adequate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Do you believe that organizational communications between central headquarters' staff and field personnel are satisfactory?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Do you believe that in your area of responsibility, communication is satisfactory between you and your subordinates?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Do you think there is adequate written communication in the organization?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Do you think there is adequate oral and group communication?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Are you satisfied that adequate communication is provided about organizational changes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Your communication with various levels of management around you is <i>largely</i> :	Downward <input type="checkbox"/> Upward <input type="checkbox"/> Circular <input type="checkbox"/>						

Management Team Evaluation...

In terms of upper-level management, the emphasis as I evaluate it is:

	Effectiveness						
	1	2	3	4	5	6	7
24. Clear organizational objectives and targets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Competency in themselves and their subordinates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Providing a leadership model for subordinates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Continuous, planned organizational renewal.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. High productivity standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. High service standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Experimenting with new ideas and approaches.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Encouragement of human resource development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Coordination and cooperation in and among the organizational work units.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Conducting meaningful and productive meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. Confronting conflict directly and settling disagreements rather than avoiding or ignoring it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. Promoting creative thinkers and innovative performers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36. Always <i>trying</i> to do things better.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37. Equal employment opportunity and affirmative action.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38. Creating a motivating environment for employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Effectiveness						
	1	2	3	4	5	6	7
39. Open, authentic communications with each other and their subordinates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40. Seeking suggestions and ideas from employees and the public (feedback).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41. Clarifying organizational roles and responsibilities so that there is no confusion or overlap.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42. Teamwork and collaboration within and among upper-level management.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
43. Effective concern for training subordinates to perform competently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44. Willingness to consider innovations proposed to increase organizational effectiveness.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45. Sharing of power, authority, and decision making with lower-level management.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
46. Policies and procedures that counteract absenteeism, slackness, and unproductivity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
47. Management of responsibility on the part of employees they supervise.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
48. Problem solving and confronting issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
49. Constantly improving working conditions, both physical and psychological.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50. Consistency in organizational policies and procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Work Group Assessment...

Please answer this section in terms of the work group you manage. That is, respond in terms of personnel who report to you or for whom you are responsible.

	Effectiveness						
	1	2	3	4	5	6	7
51. The atmosphere and interpersonal relations in my group are friendly and cooperative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
52. The members encourage one another's best efforts, reinforcing successful behavior.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
53. The group organizes and problem solves effectively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
54. The members maintain adequate standards of performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
55. The group is open to and ready for organizational changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
56. The members work effectively as a team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
57. The group communicates well within our work unit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
58. The group communicates satisfactorily with other work units.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
59. The members provide group input and may participate in the management process as appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
60. The group makes effective use of available equipment and resources (both material and human).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
61. The members generally demonstrate pride in themselves and in their work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
62. The group actively seeks to utilize the skills and abilities of its members.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Effectiveness						
	1	2	3	4	5	6	7
63. The members do not feel constrained by rules, regulations, and red tape in accomplishing their work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
64. The group is dynamic in its approaches and activities; that is, the work environment “turns people on.”	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
65. The members of this group are not characterized by conformity and dependency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
66. The group has a record of consistent accomplishment in the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
67. The members in my work group generally exercise responsibility and achievement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Managerial Self-Perception...

68. As a leader in this organization, check the words or word combinations that best describe your management approach:

- | | |
|------------------------------------------|----------------------------------------|
| <input type="checkbox"/> Idealistic | <input type="checkbox"/> Innovative |
| <input type="checkbox"/> Cooperative | <input type="checkbox"/> Task-oriented |
| <input type="checkbox"/> Change maker | <input type="checkbox"/> Hard-nosed |
| <input type="checkbox"/> Inspiring | <input type="checkbox"/> Traditional |
| <input type="checkbox"/> Realistic | <input type="checkbox"/> Pragmatic |
| <input type="checkbox"/> Individualistic | <input type="checkbox"/> Sensitive |
| <input type="checkbox"/> Change reactor | <input type="checkbox"/> Imaginative |
| <input type="checkbox"/> Participative | <input type="checkbox"/> Futuristic |

(Check appropriate category)

69. Do you seek out and use improved work methods?

- Rarely Sometimes Usually

70. Does your managerial performance demonstrate sufficient skill in:

- | | | | |
|---------------------------|---------------------------------|------------------------------------|----------------------------------|
| Administration: | <input type="checkbox"/> Rarely | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Usually |
| Human Relations: | <input type="checkbox"/> Rarely | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Usually |
| Obtaining Results: | <input type="checkbox"/> Rarely | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Usually |

71. Do you reinforce and support positive behavior and performance in your subordinates?

- Rarely Sometimes Usually

72. Do you actively encourage your subordinates to make the most of their potential?

- Rarely Sometimes Usually

73. Are you willing to take reasonable risks in the management of your work units?

- Rarely Sometimes Usually

74. Do you take responsibility to ensure that the employees you manage make their best contribution toward achieving organization goals and production targets?

- Rarely Sometimes Usually

75. Do your key subordinates really know where you stand on controversial organizational issues?

- Rarely Sometimes Usually

76. Do you demonstrate by example personal standards of competence and productivity?

- Rarely Sometimes Usually

77. Are you generally objective, friendly but businesslike in dealing with employees?

- Rarely Sometimes Usually

78. Are you doing something specific for your own personal and professional development?

- Rarely Sometimes Usually

79. Do you take responsibility to seek change in organizational norms, values, and standards when these are not relevant and need updating?

- Rarely Sometimes Usually

80. Please read back to yourself the above 12 statements (68 through 79). In light of the demands of modern management and employee expectations, how would you rate the above evaluations of your leadership role?

(Please check one):

Inadequate Adequate

81. A study by Michael Maccoby describes the new post-industrial organizational leader in this way: A gamesman, “in contrast to the jungle-fighter industrialist of the past, is driven not to build or to preside over empires, but to organize winning teams. Unlike the security-seeking organization man, he is excited by the chance to cut deals and to gamble.” The author also states that such new leaders in top management are more cooperative and less hardened than the classical autocrats, as well as less dependent than the typical bureaucrats. This sociologist suggests that the new leader is more detached and emotionally inaccessible than his predecessors, yet troubled that his work develops his head but not his heart.

How does this description of the emerging executive fit you? *(check one)*

This is comparable to the way I am/feel.

I do not identify with this new type of manager.

Organizational Relations...

Please check the category that best describes the present situation for you.

	Effectiveness						
	1	2	3	4	5	6	7
82. Employees generally trust top management.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
83. Employees usually “level” in their communications with management, providing authentic feedback.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
84. Employees usually are open and authentic in their work relations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
85. If employees have a conflict or disagreement with management, they usually work it out directly, or seek mediation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
86. When employees receive administrative directives or decisions with which they do not agree, they usually conform without dissent.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
87. Older managers are threatened by younger, competent staff members or subordinates who may have more knowledge, information, or education.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
88. Managers are able to interact effectively with minority and female peers or subordinates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
89. Managers really try to be fair and just with employees, using competence only as their evaluative criterion of performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
90. Many managers have generally “retired” on the job and are indifferent to needs for organizational renewal.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
91. Employees have opportunities to clarify changing roles and relationships.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
92. The organization is concerned about the needs of people as well as getting the task done.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
93. The organization encourages and assists employees in the development of community relations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Organizational Changes...

	Effectiveness						
	1	2	3	4	5	6	7
94. The organization is able to adapt to the dramatic shifts and changes under way in society and the larger culture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
95. The organization is able to handle the new demands made upon it as a result of the changes in top administration and management emphasis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
96. The organization does not seek adequate input from employees on those changes that affect them, or that they are to implement.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
97. The organization is able to deal effectively with the new kind of person coming into your work force and management.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
98. The organization has changed its management priorities and approaches with regard to scarce resources, as well as environmental and ecological concerns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
99. The organization is innovative in finding ways to improve the institutional environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Please recognize that cultural factors influenced the way the above items were constructed, and the way in which you responded. However, this evaluation can provide insight into your organizational culture in terms of Western perspective and future trend criteria.

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapter 4. Amherst, MA: HRD Press, Inc.

18 Organization Communication Analysis

PURPOSE:	To enhance management's awareness of the organization's communication systems and to aid in the development of strategies to improve internal and external organizational communication.
DESCRIPTION:	This instrument uses a checklist that describes employee perceptions of the organization's formal and informal, internal and external communications systems. An assessment section that explores the respondent's perception of organizational image and encourages the respondent to identify strategies for self-improvement is included.
VALIDITY:	The construct covered by this instrument is based on thorough research of literature on organizational communication. In the design of this instrument, every reasonable effort was made to ensure proper universe of content and simplicity of wording.
ADMINISTRATION:	Self- or facilitator-administered, preferably within an ongoing work group. Requires about 15 minutes.
APPLICATION:	<ul style="list-style-type: none"> • Communication Assessment/Improvement • Human Relations Training • Organization Analysis
SUITABLE FOR:	All levels
SCORING:	This is a learning instrument for use in group analysis and, therefore, is not scored as such.

Organization Communication Analysis

Analyze the communication systems in your organization by checking the appropriate boxes if you use the practice.

	System A	FORMAL	System B	
External Organizational Communication	<input type="checkbox"/> Letters <input type="checkbox"/> Telephone <input type="checkbox"/> Advertising <input type="checkbox"/> Mass media <input type="checkbox"/> Press releases <input type="checkbox"/> Publications/reports <input type="checkbox"/> Public relations/marketing <input type="checkbox"/> Community relations programs <input type="checkbox"/> Visits/field work <input type="checkbox"/> Products/services <input type="checkbox"/> Other: _____		<input type="checkbox"/> Letters/forms <input type="checkbox"/> Memoranda/reports <input type="checkbox"/> Signs/posters <input type="checkbox"/> Bulletin boards <input type="checkbox"/> Telephone <input type="checkbox"/> Closed circuit TV/radio <input type="checkbox"/> Office visits <input type="checkbox"/> Staff or other meetings <input type="checkbox"/> Organization chart for "hierarchy" communications <input type="checkbox"/> Task forces/committees <input type="checkbox"/> Other: _____	Internal Organizational Communication
	<input type="checkbox"/> Plant/office appearance and atmosphere <input type="checkbox"/> Employee contacts (outside participation) <input type="checkbox"/> Grapevine/rumors <input type="checkbox"/> Visitor/guest relations <input type="checkbox"/> Other: _____		<input type="checkbox"/> Work relationships <input type="checkbox"/> Social relationships <input type="checkbox"/> Geographic relationships <input type="checkbox"/> Union/trade/professional relationships <input type="checkbox"/> Client/customer relationships <input type="checkbox"/> Economic/status relationships <input type="checkbox"/> Cultural/religious relationships <input type="checkbox"/> Grapevine/gossip <input type="checkbox"/> Other: _____	
	System C	INFORMAL	System D	

The previous conceptual model is simply a useful means of quickly reviewing the diversity of your organization communications. By completing the following questions, you may gain a greater understanding of the status of your communications system and what you can contribute to its improvement.

I. IMAGE

- a) What is your perception of your organization's image? _____

- b) What is your perception of your division's (department's or work unit's) image?

- c) What do you feel is the perception of your unit's image of those *outside* your immediate organization/division? (Consider this from the viewpoint of those people outside of the organization, such as the public, as well as those who are in the organization but are not a part of your unit—for example, members of other departments.)

II. PUBLICS

- a) Who are the various publics to whom you communicate your organizational messages? (Remember to include such varied recipients as suppliers, politicians, and family.)

- b) What could be done to project a better organizational image to these people?

III. COMMUNICATION FLOW

Describe the direction of your formal communication systems:

- a) **Internal:**
- Downward (one-way): _____

 - Upward: _____

 - Circular (two-way or participative): _____

b) **External:**

- Outward: _____

- Inward: _____

- Circular: _____

IV. ORGANIZATIONAL RELATIONS

a) List the names (titles or categories) of those persons with whom you are in *most* frequent communication in the course of your work week:

b) Review this list and put a check next to the person or groups with whom it is vital you maintain good relations to do your job effectively.

- c) What steps can you take next week to improve your relations with these people? Be specific.

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

V. ORGANIZATIONAL ENVIRONMENT

- a) The improvement of both formal and informal communications can contribute significantly toward bettering the organizational atmosphere. What other recommendations can you make in this regard next week?

- b) What strategy or procedures will you use to accomplish this? (To whom and how will you direct your observations?)

- c) Is your organization adequately utilizing telecommunications, especially electronic networkings?

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapter 3. Amherst, MA: HRD Press, Inc.

19 Organizational Roles and Relationships Inventory

PURPOSE:	To clarify roles, responsibilities, and relationships within a triad of organizational peers or work group members. To identify barriers to effective group performance and to develop strategies for improvement.
DESCRIPTION:	A series of questions and a worksheet clarify the individual's perceptions of his or her roles, responsibilities, and relationships in preparation for a group discussion.
VALIDITY:	The construct, or syndrome of interrelated behaviors covered by this instrument, is both important and useful. In the design of this instrument, every reasonable effort was made to ensure proper universe of content, simplicity of item wording, and minimization of acquiescence and social desirability.
ADMINISTRATION:	Facilitator-administered. With group discussion, requires 50 to 90 minutes.
APPLICATION:	<ul style="list-style-type: none"> • Team Building • Communication Improvement • Organization Development
SUITABLE FOR:	All management and professional levels
SCORING:	Not applicable

Organizational Roles and Relationships Inventory

1. Triads

Form a triad group by choosing to meet with two other people directly related to the performance of your job.

2. Roles and Responsibilities

- a) On the accompanying worksheet, individually list all the functions you feel *should* be done by you (not necessarily what is done) to perform your job effectively as you see it. These should be short task statements of job duties. Be as specific and inclusive as possible.
- b) Next to each statement, list the nature of *your responsibility* toward that function. In other words, describe your role relative to the decisions that are to be made with regard to the function and/or actually accomplishing the task. The following are questions you may wish to clarify before filling in this section:
 - Do you set policy and/or guide the performance of the function?

 - Do you see that it gets done?

 - Do you personally execute the performance of the function, or do you simply need to be consulted, be notified, or give approval for someone else to accomplish the function?

3. Relationships

List the important relationships you must establish with key personnel to perform your job successfully. In the Relationship blanks, use these terms to describe the relationship: *supervisor, colleague (peer), subordinate, consultant, other.*

Name: _____
Name: _____
Role: _____
Role: _____
Relationship: _____
Relationship: _____
Rating: _____
Rating: _____

Please review the above listing and note in the Rating blanks your rating as to whether the individual's role and relationship to you is "C" for clear or "U" for unclear. (Use additional sheets if more space is needed.)

4. Resources

As you now perceive your job, what are the resources present in the situation that help you perform your job successfully?

5. Obstacles

As you see it, list the difficulties or barriers to the successful performance of your job.

6. Exchange

Taking one person in the group at a time, exchange your definitions and views with others in the triad. At the same time, others in the group are to identify and clarify points of conflict with their own view of your job. (The triad group may wish to list on newsprint the issues that cause conflict or misunderstanding.)

7. Clarification

Consolidate key issues identified as sources of friction. Analyze the changes that need to be made in roles and relationships to resolve those sources of friction. (The triad group may also wish to list these changes on newsprint.)

8. Strategies

a) What do *you* propose to do in the next month to clarify your roles and relationships and resolve points of misunderstanding?

b) What do you plan to do relative to the changes that must be introduced so that you can perform your job more effectively?

c) How can you and your division/department develop a *dynamic* procedure for reviewing roles and relationships periodically?

Worksheet for Roles and Relationships Inventory

(Use reverse side of this page if more space is needed)

No. 1 Functions

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

No. 2 Responsibilities

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

Please review these functions and responsibilities and rate them in the Rating section below as to whether you consider them “P” for primary—you have the major responsibility—or “S” for secondary—namely, someone else has the principal responsibility and yours is ancillary.

Rating

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapters 2 and 3. Amherst, MA: HRD Press, Inc.

Simons, G. F., Vazquez, C., & Harris, P. R. (1993). *Transcultural leadership*, Chapters 3 and 4. Houston, TX: Gulf Publishing.

20

Organizational Meeting Management Planning Inventory

PURPOSE:	To ensure an effective meeting, conference, or seminar.
DESCRIPTION:	<p>This instrument provides 30 critical checkpoints for planners. Included are intercultural factors in case the meeting is cross-cultural or international in scope.</p> <p>Developed in the form of a rating scale, this inventory allows the meeting planner, or his or her supervisor, to evaluate the individual from 1 (lowest) to 10 (excellence).</p>
VALIDITY:	Face validity based on the author's extensive research in management practices and behaviors.
ADMINISTRATION:	This instrument can be self-administered.
APPLICATION:	Meeting and Conference Leadership
SUITABLE FOR:	All levels of management
SCORING:	The scoring allows for skipping of some items that might not be appropriate in specific circumstances.

Organizational Meeting Management Planning Inventory

Directions:

Please supply the following information:

Name of the organizational sponsor: _____

Date of the meeting: _____

Site of the meeting: _____

Purposes of the meeting: _____

Number and function of attendees expected for the meeting: _____

Type of meeting being planned:

- | | |
|---------------------------------------------|------------------------------------------------|
| <input type="checkbox"/> Conference | <input type="checkbox"/> Regular staff meeting |
| <input type="checkbox"/> Seminar | <input type="checkbox"/> One-on-one encounter |
| <input type="checkbox"/> Operational Review | <input type="checkbox"/> Other: _____ |

In planning this meeting, please rate yourself on a scale of 1 to 10 as to how you have carried out the following functions. Use the space in the right-hand column to record your score: 1 would be lowest, 5 would be average, and 10 would be the highest rating for excellence. If the item is not applicable, just skip it and move on to the next number.

* * * * *

	Rating
1. Input was sought from both management and potential participants on this meeting's purposes and agenda.	_____
2. Objectives were clearly stated and circulated with the schedule to the intended audience or attendees.	_____
3. Adequate and comfortable site/facilities selected, and successful negotiations concluded with operators.	_____
4. Proper budgeting or provisions were made for the meeting expenses (and income if any).	_____

	Rating
5. Adequate arrangements were made for the selection and/or pre-registration of attendees, as well as on-site registration and/or welcome of meeting participants.	_____
6. Adequate negotiations and arrangements were completed for all guests, presenters, exhibitors, and other human resources required for this meeting.	_____
7. If meeting is off-site, adequate provisions were made for transportation and registrants were so informed.	_____
8. If residential meeting, adequate arrangements were made for housing and alternatives; registrants, guests, exhibitors, and staff were so informed.	_____
9. Adequate design planning as to program activities, variety, sequence, time, and pacing.	_____
10. If appropriate, adequate provision included for relaxation and play.	_____
11. Adequate arrangements ensured for ordering all program equipment, learning materials, and exhibits.	_____
12. Adequate provisions ensured for on-site monitoring and management of external support service, meeting staff, and procedures (e.g., registration and hospitality desk, refreshment and food services, exhibits, handout materials distribution, etc.).	_____
13. Adequate pre-meeting briefing of registrants and resource staff, plus coordination with site management.	_____
14. Arrangements made for special needs of participants (e.g., those with disabilities, non-smokers, session recordings, etc.).	_____
15. If necessary, shipping or mailing arrangements completed for all material and equipment on-site (or for their purchase/lease/rental on-site).	_____
16. Final checking executed satisfactorily on functional logistics (e.g., the details and set-up of meeting rooms, media equipment, exhibits, food and beverage services, etc.).	_____
17. Final confirmation of arrangements and site opportunities to all concerned (e.g., mailing of schedule or agenda with travel directions to participants, staff, presenters, and possibly entertainers, exhibitors, suppliers, and site managers).	_____
18. Provisions made for staff person or contractor to select, communicate, and coordinate with resource persons (e.g., speakers, facilitators, panelists, entertainers, exhibitors, travel guides).	_____

	Rating
19. Provisions completed for entertainment and informative program alternatives if spouse or family accompany attendee.	_____
20. If appropriate, arrangement completed for public relations program in conjunction with meeting (e.g., press release, media coverage, follow-up stories).	_____
21. Arrangement completed for recording the meeting or conference (in writing, stenotype, or audio/video); if appropriate, arrangement for editing and publishing the proceedings, and distribution and/or sale of recordings/proceedings.	_____
22. Arrangements completed for evaluating the effectiveness of the meeting and implementation of action plans set at the meeting.	_____
23. Provision for payment of all gratuities and invoices for services contracted, including any reimbursements due the participants.	_____
24. Provision for letters of appreciation or commendation to be sent to appropriate persons connected with the meeting's success (e.g., participants, presenters, suppliers, etc.).	_____

NOTE: If this is an international meeting, then continue with the inventory.

25. Prior to the meeting, personal visitation ensured that:
- The overseas facility and services were adequate;
 - Equipment and power incompatibilities were resolved;
 - Negotiations with contractors had achieved mutual cultural understanding and agreement as to what was being provided;
 - Problems of overseas shipping and entry of materials/equipment had been resolved with customs in home/host countries (whenever possible, lease or rent equipment abroad, while contracting for local supplies).
26. Observance of all the foreign formalities regarding international meeting amenities, such as:
- Invitations and confirmations to government or corporate officials invited to receptions, luncheons, and banquets;
 - Selection of local representatives to welcome participants, give addresses or lectures, and bestow honors/rewards.
27. Preparations made to facilitate intercultural communication with the locals or among participants from other countries (e.g., business cards in both languages, proper use of titles and seating arrangements, multilingual presentation of learning materials and slides, interpreters and simultaneous translation equipment, etc.). _____

Rating

28. Arrangement made for participants to enjoy the international resources, such as:
- Extra group services and discounts of airlines and travel agencies;
 - Use of local stately mansions, grand estates, or convention centers;
 - Optional offerings for local or supplemental sightseeing tours and appropriate field trips;
 - Incorporation into schedule of host culture’s food/dress, as well as music/festivals;
 - Cultural briefings on the foreign customs, protocol, opportunities, and dangers.
29. Pre-departure briefings provided all participants by mail or in person on customs regulations, currency issues, tipping, security issues, and other relevant matters (e.g., host country cuisine “pros and cons,” public safety and terrorism, cultural differences regarding meeting activities and participation, role of women in country). _____
30. Arrangements made for translations of meeting/conference proceedings in the major participant languages, as well as editing, printing, or recordings’ reproduction, and distribution of volumes or cassettes. _____

NOTE: To obtain a total score among the 30 possible selections, add up the number of items to which it was appropriate for you to respond, then tally up the number of rating scores. To obtain an evaluation average, divide the total number of items into the total of ratings.

Recommended Readings

Harris, P. R. (1994). *High performance leadership*, Chapters 7 and 8. Amherst, MA: HRD Press, Inc.

Moran, R. R., Harris, P. R., & Stripp, W. G. (1993). *Developing the global organization*, Chapters 9 and 10. Houston, TX: Gulf Publishing.

Epilogue

In the information society now emerging, knowledge workers predominate. They seek more information about themselves, their colleagues, and their work environment. Their management, whether in general supervision or in human resources, also wish to know more about their personnel and their organization. That is why we have provided mechanisms for collecting data for such purposes in *20 Reproducible Assessment Instruments*. Whether these questionnaires are called inventories, indexes, surveys, or analysis forms, they provide an organized means for people to express themselves on a specific subject area. These inquiries increase awareness, provide feedback, and can be used as a basis for discussion among peers, or between an employee and a manager, or mentor, or counselor. The objective is to improve insights about ourselves, others, and the systems with which we are associated. It has been observed that our jobs are the “watersheds” down which life flows—we spend so much of our lives at work. The forecasts indicate that in the **new work culture**, we will spend less time on the job and more in personal pursuits. In either case, the instruments in this book result in data that will prove useful to enhance our lives, on or off the job. Certainly, if used wisely, they will increase both self-knowledge and understanding of others.

In the Epilogue of our companion volume, *High Performance Leadership*, the author developed the concept of “The Learning Manager” in some depth. Readers might find it worthwhile to review those ten pages before beginning to reproduce the instruments in this work for use with others. If an HRD manager employs these human factor data-gathering devices as part of a training program, people will change as a result of such learning experiences. The information obtained is dynamic, as pre- and post-administration training will reveal. A second administration a year or more later after the first administration will also reveal the differences in attitudes and outlook that come from new learning and experience.

In the final offering of this series, *New Work Culture and HRD Transformation Management*, the profound changes underway in our work environment are analyzed. One such post-industrial change is the contingency workforce. These are people with special competencies who are temporary, part-time employees. An HRD manager or supervisor has limited knowledge of such persons’ capabilities and attitudes. Having them selectively fill out one or more of the instruments between the covers of the present volume will provide managers with rapid “intelligence” about the thinking and perceptions of such contract workers or consultants.

Whatever one’s reasons for completing or administering a data-gathering instrument, the ultimate outcome should be increased awareness and improved performance.

Resources

Commercial Sources of Data-Gathering Instruments:

CENTER FOR CREATIVE LEADERSHIP, One Leadership Place, P.O. Box 26300, Greensboro, NC 27438-6300, USA. Telephone: 919-288-7210; Fax: 288-3999. Request *Resource Guide* and to be placed on mailing list for complimentary newsletter, *Issues and Observations*.

CENTER FOR RESEARCH ON UTILIZATION OF SCIENTIFIC KNOWLEDGE, Institute for Social Research, University of Michigan, Ann Arbor, MI 48106, USA. Engage in social science/survey research, such as Likert Scale; request brochure.

HRD PRESS, INC., 22 Amherst Road, Amherst, MA 01002-9709, USA. Telephone: 800-822-2801; Fax: 413-253-3490. Request catalog of books, instruments, and other training aids.

NATIONAL COMPUTER SYSTEMS, Professional Assessment Services, P.O. Box 1416, Minneapolis, MN 55440. Telephone: 800-627-7271 or 612-963-2800. Request annual catalog of computerized assessment tests and inventories.

NEW LEADERS INSTITUTE, P.O. Box 1110, Del Mar, CA 92014, USA. Telephone: 619-792-5922; Fax: 619-792-9874. Request information packet on their diversity publications and VIEWS organizational assessment instrument.

THE PSYCHOLOGICAL CORPORATION, HR Measurement, Harcourt Brace and Company, 555 Academic Court, San Antonio, TX 78204-2498, USA. Telephone: 800-727-0807; Fax: 800-727-0811. Request brochure on their HR tests and inventories, as well as the Consultant Connection program.

References Related to Themes in this Book:

Gulf Publications/Book Division, 3301 Allen Parkway, Houston, TX 77252-2608. Telephone: 800-231-6275; Fax: 713-525-4647.

HRD Press, 22 Amherst Road, Amherst, MA 0102. Request information on INSIGHT INVENTORY, a self-reporting behavior profile with accompanying training manual, feedback set, and video program.

Harris, P. R. & Moran, R. T., eds. (1992–1995). *Managing cultural differences series*, 6 volumes including *MCD instructor guide*, a book of case studies, and a multicultural resource directory.

Anderson, T. D. (1992). *Transforming leadership—new skills for an extraordinary future*.

Bellingham, R., & Cohen, B. (1993). *The managing change training program*.

Bellingham, R., Cohen, B., Edwards, M. R., & Allen J. (1992). *The corporate culture sourcebook*.

Harris, P. R. (1994). *High performance leadership—HRD strategies for the new work culture*.

Harris, P. R. (1995). *New work culture and HRD transformational management*.

LaMountain, D., & Abramms, B. (1992). *Cultural diversity: a workshop for trainers*.

Reynolds, A., & Nadler, L. (1992). *The global HRD consultant's guide and practitioner's handbook*.

Rothwell, W. J., & Sredl, H. J. (1993). *ASTD guide to professional HRD roles and competencies*, 2 volumes.

Westgaard, O. (1993). *Good fair tests: test design and implementation*.

Jossey-Bass Publishers, 350 Sansome St., San Francisco, CA 94104, USA. Telephone: 800-605-2665 or 414-433-1767, Ext. 409; Fax: 413-433—0499.

(Inquire about their *Human Resource Development Quarterly*, a journal published in conjunction with the American Society for Training and Development.)

Black, J. S., Gregersen, H. B., & Mendenhall, M. E. (1992). *Global assignments—successfully expatriating and repatriating international managers*.

Block, P. (1993). *The empowered manager—positive political skills at work*.

Drucker, P. (1993). *Self-assessment tool for nonprofit organizations*.

Mink, O. G., Esterhuysend, P. W., Mink, B. P., & Owen, K. Q. (1993). *Change at work—a comprehensive management process for transforming organizations*.

Morrison, A. M. (1992). *The new leaders—guidelines on leadership diversity in America*.

Schmidt, W. H., & Finnigan, J. P. *TQManager—a practical guide for managing in a total quality organization*.

Watkins, K. E. (1993). *Sculpturing the learning organization*.

Wellins, R. S., Byham, W. C., & Wilson, J. M. (1993). *Empowered teams*.

Center for the Study of Work Teams, University of North Texas, P.O. Box 13587, Denton, TX 76203-3587, USA. Telephone: 817-565-3096; Fax: 817-565-4806.

(Request to be placed on the mailing list for their complimentary Self-Managed Work Teams Newsletter, and information on their conferences, tapes, and proceedings, as well as technical papers.)

About the Author

Philip R. Harris is president of Harris International, Ltd., in La Jolla, California. He received his Ph.D. and M.S. in psychology from Fordham University, and his B.A. from St. John's University in business administration. Dr. Harris was first licensed as a psychologist in 1959 by the University of the State of New York Education Department.

For the past 30 years, Harris has been engaged in leadership development as a management and organizational psychologist. His behavioral science research focus has been on change, culture, communication, and management, but more recently as a space psychologist on *Living and Working in Space*, the title of his 1992 book for Ellis Horwood/Prentice Hall. Dr. Harris has now authored or edited 39 professional books and published 200 journal articles. In addition to being co-editor of the *Managing Cultural Difference Series* for Gulf Publishing, he is on the editorial advisory board of the *European Business Review* in the United Kingdom and is book review editor for *Behavioral Science*. He has served as a consultant on six major media projects to produce learning systems for such producers as NBC and Westinghouse. Recipient of numerous research grants, including the Office of Naval Research, his many awards include a Fulbright professorship to India from the U.S. State Department, a NASA Faculty Fellowship, the TORCH AWARD from the American Society of Training and Development for outstanding HRD contributions, and the International Space Year Award in 1993 from the World Bar Association.

In his global management practice, Harris has successfully served more than 190 multinational corporations, government agencies, military services, consulting organizations, and trade/professional associations. A former senior scientist at Netrologic, Inc., he was also vice president of Copley International Corporation, both in San Diego. In his early career as an educator, he was vice president and director of Student Personnel Services at St. Francis College (NYC), as well as a visiting professor and lecturer in many universities worldwide, including The Pennsylvania State University, Temple University, and Sophia University Tokyo. Dr. Harris has served as a senior associate for Leadership Resources, Inc., a fellow of the National Training Laboratory (NTL), and as a project research consultant for the State of California's POST Command College for law enforcement executives. In the current stage of his career as a space psychologist, he was admitted as an associate fellow of the American Institute of Aeronautics and Astronautics, while receiving four journalism awards of excellence from the Aviation/Space Writers Association.

