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DIAGNOSING AND DEVELOPING CROSS-CULTURAL EXPERTISE IN GLOBAL LEADERS

Abstract

Cross–cultural expertise is highly important for leaders in an expanding, ever more diverse world of interaction. How do we find out where we are in our own state of readiness for cross-cultural inter-relationships? How can we diagnose others' development of diversity competencies? The author reviews a new instrument for detecting "intercultural sensitivity" and comments on his use of the inventory in business and educational audiences.

Background

TEAM International® was a Network Associate of the Center for Creative Leadership (CCL) from 1983 till 2009. As such, we conducted CCL's flagship assessment-for-development program, the Leadership Development Program (LDP) in English (in San Antonio, TX) and in Spanish (in Mexico City). Sensing a need for a cross-cultural element in the U.S. Program, during several years of our association we included in the English-language LDP a module entitled "Managing Across Cultures", including some model of cross-cultural difference such as Hofstede's (1980) or Trompenaars's (1998).

Although the module always included the same elements that made the LDP successful over the years (assessment diagnostics and active learning), the MAC element frequently did not earn the same high scores that the rest of the elements did. Moreover, comments often included statements like "…too elementary…" or "…not relevant to my situation…"

Upon further reflection and investigation, TEAM International® came to believe that much of the problem lay in our inability to target the element properly. There were participants with considerable "experience" across cultures, either international or in U.S. co-cultures, and others who had neither experience nor much interest in the concepts. Our apparent problem was that we were doing a "shotgun" approach rather than "rifling" the presentation according to participants' expertise and interest. What we appeared to need was some kind of diagnostic tool to help assess where participants were in their cross-cultural exposure and development, much like the other instruments already included in the LDP (such as the Myers-Briggs Type Indicator or the FIRO-B interrelationship preference survey).

A possible solution to this conundrum has recently appeared (1998) in the form of the Intercultural Development Inventory (IDI), a diagnostic tool for detecting "intercultural sensitivity" developed and validated by Milton Bennett and Mitchell Hammer.

<u>The Bennett Model</u>

Bennett first published his "Development Model of Intercultural Sensitivity" (DMIS) in a seminal article (1986). The model describes six stages of cross-cultural "development" across a scale from "Ethnocentric" to "Ethnorelative". Graph 1 depicts this scale.

Denial is the most basic ethnocentric state, reflecting an orientation (or "worldview") which assumes there are no real differences among people from other cultures. This state may be somewhat rare in educated, travelled groups; but it may still be found among people who separate themselves physically from culturally different others, e.g. in an enclave where interaction with others is at a minimum. A common form of Denial might be called parochialism, where there is a lower level of contact with difference than is possible. Here broad categories are possible, e.g. "Asians" are known to be different from "Westerners", without recognition that both "Asians" and "Westerners" are different among themselves. Likewise, "Hispanics" are undifferentiated into the many cultural groups that comprise them, such as Mexican-Americans, Cuban-Americans, etc.[1]

In the next stage, *Defense*, differences are recognized; but one's own culture is deemed superior. It may even be that people in Defense are threatened by the other culture(s), but a typical response is tolerance or superior indifference. "What do you expect, she's Vietnamese," might reflect feelings of superiority. Or, more benignly, "America is the greatest nation that has ever existed. Our way of life is an example for other countries."

Minimization might be thought of as a last-ditch effort to maintain one's ethnocentricity – to the point where differences are buried under the weight of cultural similarity. Here, cultural difference is seen as trivial – "We're all children under God," (sometimes nicknamed the Missionary Position). Difference is minimized, underestimating and undervaluing the truly important and interesting matters of differences between people. However, Minimization still represents an advance over Defense – at least cultural difference is recognized to some degree.

The *Acceptance* scale of cultural difference represents a move from ethnocentrism to ethnorelativism. At this stage, cultural difference is both acknowledged and respected. There seem to be two major levels of acceptance: the first is respect for behavioral difference, including language and communication style, both verbal and non-verbal. The second is deeper – respect for value difference, which may involve acceptance and affirmation of different worldviews, such as the place of religion in the society or the sanctity of monogamous relationships.

A second stage of ethnorelativism is *Adaptation*, where individuals can use what they have learned about behavioral and value difference in order to communicate effectively with persons of other cultures. This does not mean that people "give up" their own cultural beliefs and practices, but that they make a proactive effort to use intercultural skills in order to maximize communication and the closeness of relationships with people of other cultures. This might be exemplified by a Japanese manager who uses brainstorming, confrontation, and highly interactive verbal participation to communicate with foreign associates. Or a U.S. American who consciously puts social contact ahead of business conversation with a Mexican client.

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[1] An extreme form of Denial is to accord sub-human status to people who are different, such as Blacks in the 19th century U.S. or Jews in Nazi Germany. This is the dark side of Denial, which can and has led to subjugation and even extermination.

Integration, the "most ethnorelative" stage of cross-cultural development, occurs when a person can not only "adapt" to cultural differences, but also construe him/herself in different cultural ways. This might be possible for a person who has grown up in two (or more) different cultures and can switch, for example, from "American" to "Japanese" (or from African-American to European-American) more or less at will, taking on behaviors and values from different cultures as the need arises. While seen as a positive and useful attribute for cultural mediation, this ability to make cultural shifts may also lead to some degree of "footlooseness" or "rootlessness", where one does not feel really anchored in any culture. It may also be characteristic of "global nomads" who have a "passport culture" but feel "marginalized" in their supposed home culture.

The IDI

The instrument resulting from the Bennett DMIS model, the Intercultural Development Inventory, now appeared to offer us a way out of the diagnostic problem we were facing in the "Managing Across Cultures" module. The Inventory is a 60-item, pencil-and-paper instrument that empirically measures the 6 ethnocentric/ethnorelative orientations considered in the Bennett model.[2]

The instrument can be scanned and scored locally, so it promised to be an interesting possibility for use in the Leadership Development Program® on an experimental basis, and elsewhere in our developmental programs.

Trial Usage of IDI

On a trial basis, we used the IDI in several contexts. The first was at the CCL® LDP Network Conference, with all locations offering the Leadership Development Program in attendance. About 20 members of the group (out of 40) volunteered to take the instrument and hear the presentation of the DMIS model. Reactions were favorable, but there was considerable rejection of some of the terms considered pejorative, such as "Denial" and "Defense". A couple of the participants, test users themselves, objected to many of the questions as having more than one meaning in the same statement. (This was defused upon knowing the questions were actual statements of persons in different stages of development.)

A further learning from this first run was that a group of professionals in leadership development and training might be expected to place in the Acceptance stage: as the *Manual* (Hammer & Bennett, 1998) states …"this is an accurate reflection of the population accessible to intercultural trainers…People such as business managers, academics, and students are likely to know what is currently defined as appropriate and inappropriate attitudes toward cultural difference and diversity." ("Interpreting the IDI", p. 49)

This central tendency toward Acceptance was accompanied in a large number of CCL® Network respondents by the carryover of some Minimization issues (i.e. ambivalent scores [3= "slightly disagree", 4= "neutral", 5= "slightly agree"] on Minimization subscale items). Hammer & Bennett call these "Transition Issues", (See *Manual* "Interpreting the IDI", p. 38.) In these cases, an examination of the subscale items

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[2] Actually, only 5 of the orientations presented above are assessed. *Integration* was not found to be an empirically distinct orientation. However, *Adaptation* is broken down into 2 scales (Cognitive Adaptation and Behavioral Adaptation). Also see Graph 1.

would lead one to understand some important refinements to the IDI feedback: the instrument is also valuable in pointing to possible unresolved issues in intercultural development as one moves across stages.

In this same vein, there was almost universal "overestimation" of cultural development, as evidenced by higher (self-) "Perceived Scores" (PS) than "Developmental Scores" (DS). These scales were developed by Bennett and Hammer in order to counter this possible tendency.[3]

The second run was conducted during an actual TEAM International® program, with participants completing at their option the IDI beforehand and receiving their individual results during the DMIS presentation. Nine of 10 group members chose this option, indicating a possible higher degree of participation when personal results will be available. Similar results in the Acceptance range were observed, and comments about the pejorative terms again surfaced—although mitigated this time by a preemptive warning on the terms to be used. In a couple of cases (one in particular where the manager was a Canadian trilingual living in Japan), the Developmental Score was higher than the Perceived Score. This possibility is not mentioned in the IDI manual, and the converse of the PS>DS suggesting *underestimation* of cultural development is not intuitively obvious in its meaning.

A third test run was conducted with a larger group of LDP participants (13) at CCL's San Diego campus. The tendencies demonstrated above for the first two groups were nearly universal in this participant group as well: high levels of Acceptance, accompanied by some ambivalent scores in Minimization. Likewise, Perceived Scores were uniformly higher than Development Scores in this group as well, a few significantly.

There was one surprise: one of the respondents made binary responses – 1 or 7 – to every question except one (which was not answered). Nearly all of the 1s were in Denial and Defense, and the 7s in Minimization, Acceptance, and Cognitive and Behavioral Adaptation. It is difficult to understand how one might "strongly agree" with all the statements in Minimization (e.g. in the "Universal Values" items) and at the same time "strongly agree" with all those in Acceptance (e.g. in all the "Value Relativity" items). It might appear that this respondent was either quite confused when answering the instrument, or else faking his response entirely. (This illuminates another possibility in the IDI – falsification of the instrument.)

This possibility, however, also points up a basic tenet in the use of IDI: the inventory is meant to be used *only* in a "coaching" or "feedback" context, where the administrator is able to conduct an interview with the respondent and to place his/her response pattern within this personal development context. In the example above, it is possible that the respondent has a highly ethnorelative worldview, but also with highly conflictive issues around the importance of differences. This would have to be resolved through biographical analysis and conversation.

The fourth test run came through an LDP group in Australia, with another Network Associate, the Mt. Eliza Business School. Only 5 IDI protocols were made available,

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[3] See Hammer & Bennett, *Manual* "Interpreting the IDI", p. 49. The PS score corresponds to the "raw response" on the highest scale scores. The DS weights the raw responses with a formula that reduces ethnorelativism depending on how much ethnocentrism is present in the overall profile. The discrepancy between the two scores can be interpreted as the "developmental distance", or the extent to which the underlying worldview structure does not support the self-perception. A .5 difference is taken as significant.

and for these the results were very similar to the U.S. profiles: higher scores in Acceptance with carryover of some Minimization or "Transition" issues. In all cases, the Perceived Scores were above the Developmental Scores, as observed in the other runs described above. Again, no biographical information was available, but these managers appeared to share the same worldview tendencies as their U.S. counterparts.[4]

A final run was carried out with 17 students in a leadership development program of the Hispanic Chamber of Commerce of San Antonio. Fifteen of these 17 self-identified as "Hispanic American" in the introductory bioforms. Again, these students' overall profile was remarkably similar to their business counterparts in the earlier samples: higher in Acceptance, ambivalent scores in Minimization, and uniform Perceived Scores above Developmental Scores. Apparently this general profile is not restricted to "Anglo" nor to executive groups, but follows the same pattern observed by Hammer and Bennett in their audiences of educated people.

Conclusions

Practical experience with the Intercultural Development Inventory leads us to the conclusion that this instrument has considerable possibilities for use in a Managing Across Cultures program or as an element within a general assessment-for-development program in business or academic contexts. Moreover, the IDI could beneficially be used more specifically in personnel development interventions, especially when the task is around the development of cross-cultural leaders. The IDI would also be useful here in diagnosing some central tendencies in groups, e.g. the lingering presence of Minimization issues in groups who are transitioning into Acceptance and believe themselves already there.

A major caveat is that the IDI is only interpretable in the framework of broader knowledge of the respondents' backgrounds. As such, the instrument fits well in the context of an assessment-for-development program like our own. More broadly, the IDI offers the trained administrator a powerful way of participating in the cross-cultural development efforts of organizations who increasingly find they must broaden the worldview of their students, executives, managers, and administrators who are or will be responsible for decisions across cultures around the globe.

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[4] A final learning was a technical one: in our trial runs, the CD-ROM scoring software program provided with the IDI would not allow us to scan-score the protocols correctly. This required labor-intensive hand scoring, which would limit our large-scale usage of the instrument. Communication was underway with the suppliers of IDI in an effort to solve this problem.

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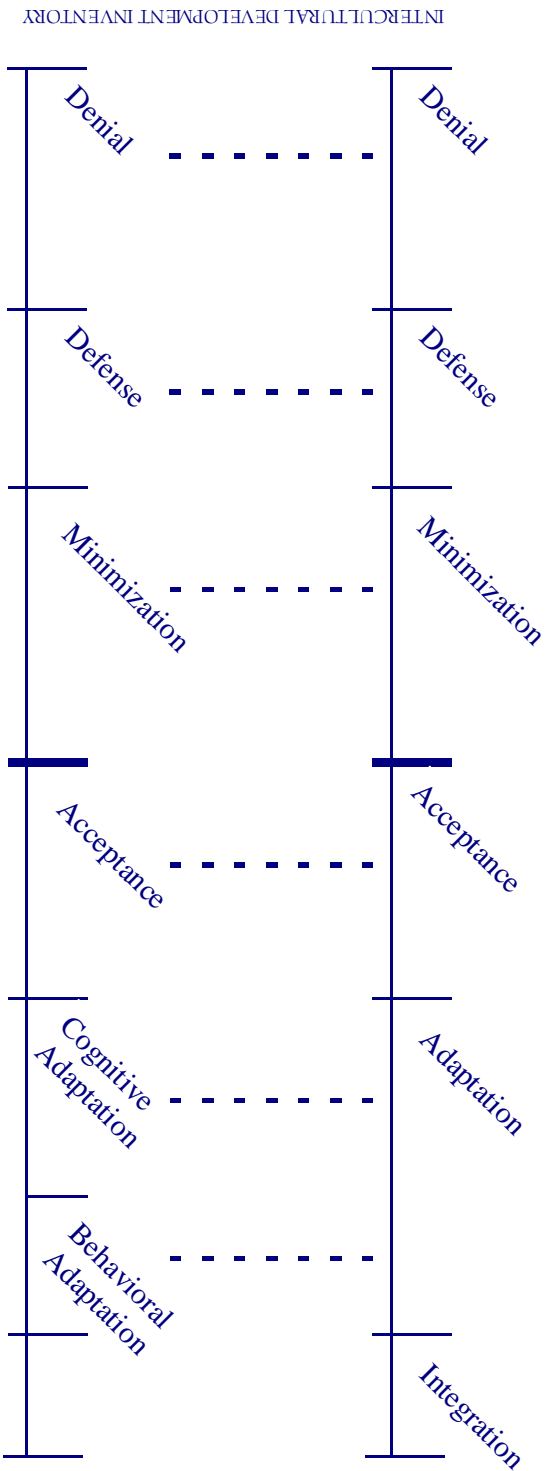
DEVELOPMENT OF INTERCULTURAL SENSITIVITY
Experience of Difference

Graph 1

Ethnocentric Stages

Ethnorelative Stages

DMIS

Denial

Defense

Minimization

Acceptance

Adaptation

Integration

Ethnocentric Scales

Ethnorelative Scales

IDI

Denial

Defense

Minimization

Acceptance

Cognitive Adaptation

Behavioral Adaptation

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