Thank you for using the Intercultural Effectiveness Scale (IES) in your class. This Instructor’s Guide is designed to provide you with suggestions for developing learning modules around the feedback results of your students after they take the IES.

“Travel is fatal to prejudice, bigotry, and narrow-mindedness.”
- Mark Twain

The Instructor’s Guide is divided into three main sections: 1) Overview of the IES; 2) Learning Modules; and 3) Integration in Course Design. We welcome input about your success stories of using the IES in your classroom; please share them with us. Contact us at our website: www.kozaigroup.com

Overview of the IES
This section contains both a general description of the IES and an in-depth content domain analysis of the IES
Page 2

Learning Modules
This section contains suggested learning models for 50 minute, 90 minute, and 3 hour class sessions.
Page 10

Course Design
This section contains creative ideas of how to use the IES as a catalyst for student learning throughout the entire semester.
Page 25
Overview of the IES

The IES provides an assessment of the degree to which students possess competencies that are critical to interacting effectively with people from other cultural backgrounds.

The IES focuses on three dimensions of intercultural effectiveness, and these three dimensions are combined to generate an Overall Intercultural Effectiveness Score in the individual feedback report.

The first dimension assessed by the IES is Continuous Learning. This dimension examines how people cognitively approach cultural differences, and the degree to which individuals engage the world by continually seeking to understand themselves and also learn about the activities, behavior, and events that occur in the cross-cultural environment.

Additionally, this dimension examines people's tendency to be rigid in their view of cultural differences, their tendency to be judgmental about those differences, and their ability to deal with complexity and uncertainty.

The second dimension assessed by the IES is Interpersonal Engagement. Developing positive intercultural relationships depends in large part on one's interest in learning about people from other cultures, their customs, values, etc.

This aspect of relationship development is assessed in the IES along with the degree to which individuals have the desire and willingness to initiate and maintain relationships with people from other cultural backgrounds.

The final dimension is Hardiness. Interacting with people from different cultural backgrounds requires significant effort, which often produces stress, anxiety, and sometimes fear.

This dimension assesses the degree to which individuals are able to wait to understand a situation or person versus the tendency to make snap judgments, which can produce anxiety and stress in cross-cultural relationships.

This dimension also assesses the degree to which individuals can manage and control their emotions, learn from their mistakes, and emotionally rebound from setbacks.

A Quick Summary

The IE assesses:

- how we learn about another culture and the accuracy of that learning
- our orientation toward developing and managing relationships with people from other cultures
- how we manage the challenges and stress involved in interacting within a different cultural environment
The Dimensions of the IES

The IES examines three dimensions of intercultural effectiveness: Continuous Learning, Interpersonal Engagement, and Hardiness.

- **Continuous Learning** is comprised of two dimensions: *Self-Awareness* and *Exploration*
- **Interpersonal Engagement** is comprised of two dimensions: *Global Mindset* and *Relationship Interest*
- **Hardiness** is comprised of two dimensions: *Positive Regard* and *Resilience*
- An **Overall IES Score** is generated by combining the results of the above six dimensions
SELF-AWARENESS

This dimension measures the degree to which one is aware of one’s personal values, strengths, weaknesses, interpersonal style, and behavioral tendencies, as well as the impact of these things on other people. It also assesses the degree to which one reflects on this knowledge in order to engage in personal development and learning activities.

High scorers are extremely aware of their own personal values, strengths, weaknesses, interpersonal style, and behavioral tendencies and how they impact and affect others; they are constantly evaluating their personal growth and reflecting on their experiences and what they can learn from them.

Low scorers tend to be uninterested in self-discovery and find it very difficult to discern how their personal values, strengths, weaknesses, interpersonal style, and behavioral tendencies affect other people, and are not particularly attuned to or motivated to try to do so.

EXPLORATION

This dimension assesses the extent to which one is open to and pursues an understanding of ideas, values, norms, situations, and behaviors that are different from one’s own. It reflects a fundamental inquisitiveness, curiosity, and an inner desire to learn new things.

It also reflects one’s willingness to seek out new experiences that can cause learning or a change in one’s perspective and behavior, and the ability to learn from mistakes and to make adjustments to one’s personal strategies to ensure success.

High scorers are extremely inquisitive, curious, and open to new ideas and experiences, even to the extent of actively seeking them out. Low scorers have a strong preference for maintaining current habits, traditions, and ways of thinking, and exhibit little or interest in exploring other ideas or ways of doing things.
INTERPERSONAL ENGAGEMENT

GLOBAL MINDSET

This dimension measures the degree to which one is interested in, and seeks to actively learn about, other cultures and their people. This learning can take place from newspapers, the Internet, movies, foreign media outlets, course electives in school, or television documentaries. It also measures the degree to which one proactively seeks out these outlets to expand one’s global knowledge about people and their cultures, and reflects the strength of one’s global mindset. Global mindset provides the basis upon which one can interact more effectively with people from other cultures.

High scorers consistently expose themselves to information about cultures other than their own. This expands the basis for finding commonalities that encourage discussions with those from other cultures. Low scorers reflect strong tendencies to avoid learning about other cultures and rarely go out of their way to expose themselves to information about new cultures. This reflects a mindset that is more domestic or provincial in nature, and as a result, decreases the proclivity to interact with people from other cultures.

RELATIONSHIP INTEREST

This dimension measures the extent to which one is likely to initiate and maintain positive relationships with people from other cultures. It measures the degree to which one is inclined to seek out others in new cultures in order to build relationships, as well as the desire and ability to maintain those relationships once they have been created. It also measures whether engaging others is an energy-producing or energy-depleting activity. One’s willingness to use a foreign language in developing new relationships is also an important part of this dimension.

High scorers are extremely interested in developing new relationships, and then maintaining those friendships. They find this process stimulating, and would be willing to learn and use a foreign language in order to develop relationships with people from other cultures. Low scorers tend to put very little effort into developing new friendships or maintaining existing relationships; they would expect the other party to take responsibility to maintain the relationship and are much more likely to believe that others need to learn their language in order for there to be a relationship.
HARDINESS

OPEN-MINDEDNESS

This dimension measures the degree to which one withholds judgments about situations or people that are new or unfamiliar. It also reflects the degree to which one is open to alternative perspectives and behaviors in general. It measures the tendency to avoid stereotypes and be open to perceiving the complexity of individual behavior and differences within a group of people.

High scorers nearly always wait to understand the situation or people before making a judgment, and also tend to refrain from extreme stereotyping.

Low scorers have a strong tendency to make snap judgments about situations or people and usually are reluctant to change their conclusions once made. They also tend to make sense of the world around them by regularly stereotyping people and situations they encounter, especially in new cultures.

EMOTIONAL RESILIENCE

This dimension measures one's level of emotional strength and the ability to cope with challenging emotional experiences. It also assesses capacity to recover quickly from psychologically and emotionally challenging situations. How one manages these kinds of experiences influences the tendency to remain open, develop relationships, and interact effectively with others.

High scorers have the ability to cope well with challenging emotional situations and as a result their recovery from psychologically or emotionally difficult experiences usually takes little time. They are able to continue learning about the new culture and develop effective relationships.

Low scorers find it extremely difficult to handle psychologically and emotionally challenging experiences well; their recovery from such experiences takes a long time and, even then, may never be fully achieved. This limits their ability to remain open to others and to learn from their cross-cultural experiences.
Providing a Context of Understanding

Before providing detailed feedback about students’ scores, we suggest discussing with them the general purpose of questionnaires, their strengths and limitations, how to interpret questionnaire scores generally -- and to realize that questionnaires are not perfect; that is, a well-constructed assessment will never 100% portray “how you really are.” Emphasize that a well-constructed inventory will be able to surface strong cognitive and behavioral tendencies one possesses, and thus provides useful insights into the ways a person thinks and behaves, insights of which they may not be entirely conscious. We stress that students should ponder their results and consider what the results tell them about themselves in terms of their intercultural interaction tendencies. Once they have been debriefed and understand the competencies on which they were assessed, we also have them discuss these results with someone whom they trust, and who knows them well, in order to gain further personal insight regarding their competencies.
REVIEWING THE IES FEEDBACK REPORT

The IES Feedback Report describes results for each of the six IES dimensions, and presents the range in which personal scores fall. Individual results are presented based on where they fall across several categories, ranging from “very low” to “very high,” for each of the six subdimensions (Self-Awareness, Exploration, Global Mindset, Relationship Interest, Open-Mindedness, and Emotional Resilience). These ranges reflect an individual's current level on each dimension relative to all other people who have taken the IES.

An Overall Intercultural Effectiveness Score is also given at the bottom of the feedback report. It is important to note that this score is NOT an average of the six subdimension scores. Rather, it is based on analyzing the responses to each question in the IES and then comparing those answers to those who have previously taken the IES.

The Overall Intercultural Effectiveness Score does not reflect an average of one's scores, but rather one’s overall readiness to perform effectively in interacting with others from a different culture compared to others who have completed the IES. In this respect, it is analogous to the readiness of an automobile to be an effective means of transportation. If the engine is in fine working order, the electrical system operational, and the wheels mounted and tires properly inflated, the car would still not be considered road-worthy if the brakes were missing. One would not average those components equally and conclude that the automobile was 75% safe to drive. The missing brakes have a non-proportional influence on the assessment one would make as to the readiness of the automobile to be on the road.

Similarly, even though an individual may score quite high on, say four of the six subdimensions, an extremely low score on one of them could influence the Overall Intercultural Effectiveness Score to be lower than if the six subdimension scores were simply totaled and averaged. We find that using the analogy of a car's road readiness helps students to understand the concept of the Overall Intercultural Effectiveness Score, and to offset their natural propensity to simply assume that an overall score naturally reflects an averaging process.
Also, notice that each of the three main dimensions of the IES (Continuous Learning, Interpersonal Engagement, and Hardiness) also has its scores calculated in a similar manner; with scores reflecting a comparison of configurations of the two subdimensions associated with each main dimension (e.g., Self Awareness and Exploration scores contribute to the overall score for Continuous Learning). As with the Overall Intercultural Effectiveness Score, these scores are not averages of the two dimensions that compose each main dimension. Rather, the overall score for each main dimension reflects a statistical comparison of the configuration the two sub dimension scores based on recalculating their individual answers compared to all configurations of these subdimension scores of all those who have taken the IES. Again using the automobile "road readiness" analogy is helpful in describing these overall scores for students.

At this stage of the debriefing, we like to share with students some comparison statistics so that they can compare themselves to other demographic groups that have taken the IES. We also focus on sharing with the students that the sample norms against which they were compared have not been taken from the general population; if they had been, the students would likely have scored higher on the competencies.

The people who make up the database norms, and against whom each individual’s profile is compared, have come from as many nationalities and regions of the globe as possible, as well as many walks of life, including a balanced mix of working employees, representative levels of managers, and many college students (both graduate and undergraduate) from around the world. Each individual’s IES profile is determined by taking his or her response patterns to the survey questions, and comparing them to a large data set of norms based on thousands of people who completed the IES during many years of development and validation.

Nearly 70 different nationalities are reflected in the norm population of the IES. Regionally, North America is the largest subpopulation (58%), followed by Asia (24%), Europe (13%), with the remaining 5% coming from countries across Latin America, Africa, and the Middle East. Comparison demographic statistics of the database norms are available in PowerPoint slide format and can be downloaded from our website at http://kozaigroup.com
In this instructor’s guide we have prepared learning modules for 50 minute, 90 minute, and 3 hour time periods. We have organized the learning process in each module to be flexible enough to allow for time extensions in each phase, so that you can adjust content coverage to fit the time frame of your class.

We have also prepared lists of suggested cases, video clips, and discussion formats that you can use to fine-tune and modify the modules to fit best with your style of teaching. We view these modules not as the best way of presenting the material, but rather as tested approaches that have worked well for instructors who have used the IES in their classrooms.

Each of the creators of the IES actually presents its content slightly differently, according to our teaching style and personality – the modules are integrations of our teaching experience using the IES.
THE 50 MINUTE LEARNING MODULE

PROVIDING A CONTEXT OF UNDERSTANDING – 10 MINUTES

If you chose the “do not release report” in the administrator function on the IES online site, you will need to print out the students’ personal feedback reports and distribute them. If you released the feedback reports to the students, they can print them out themselves. In this case, make sure to inform the students to bring their feedback reports to class with them.

After distributing the feedback reports, share your thoughts and perspective about how one can best go about applying questionnaire results to one’s life in such a way that the process is a beneficial one. We could outline a brief lecture for you to follow, but we have found that sharing this information is best done from an instructor’s personal perspective about the issues we raised on page 7. The students will listen and learn, we feel, if this part of the class comes directly from the instructor’s personal point of view.

REVIEW THE IES FEEDBACK REPORT – 10 MINUTES

Following the information provided in pages 8-9, review with the students the information that is provided for them on their feedback reports. It may be tempting to want to jump right in to discuss the competencies themselves and what the scores mean, but we have found that it is better first to familiarize the students with the meaning of the overall scores for each dimension and for the entire inventory, and to help them understand who their scores are compared against, and to give them an idea of the varied demographic groups that have taken the IES.

REVIEW THE COMPETENCIES – 20 MINUTES

The feedback reports contain descriptions of each competency and how the student scored in comparison to those who have taken the IES. Theoretically, students should be able to read this information and learn from it on their own. We have found, however, that it is beneficial to go through each competency, one by one, and to review the definition and meaning of each competency with the students. In a 50 minute class session, it may not be feasible to review each of the competencies in an in-depth fashion, using multiple illustrations and engaging the students in discussion about each competency. In Appendix 1, we provide definitions of each competency along with brief case examples that can be used to illustrate each competency.
REVIEW THE COMPETENCIES – 20 MINUTES, CONT.

We strongly suggest using your own intercultural experiences or experiences from others whom you know to illustrate the competencies. Personal “war stories” are always more interesting to students than illustrations or mini-cases from external sources. Again, due to time constraints in the 50 minute class, it may be possible to only illustrate one or two of the competencies with personal experiences and subsequent class discussion around those experiences.

CONCLUSION AND TAKE AWAY – 10 MINUTES

1. Write Can on one side of the whiteboard, and Cannot on the other. Elicit from the students reasons why they believe these competencies can be developed and write those in the Can column.
2. Next, elicit from the students reasons why they feel other competencies cannot be developed, and write those under the Cannot column.
3. Then ask the class to consider if there are any deeper underlying issues that might trump the arguments they listed for each list: e.g., personal motivation, fear of failure, crucible/transformational experiences, degree of value differences in the new culture and one’s native culture, etc. Explore with the students how these variables can and do influence our attempts at strengthening weak competencies.

Time constraints may prevent much of a discussion beyond the lists of issues that the students produce for the Can and Cannot columns. If so, conclude the class after Step 2 above, and assign Step 3 as a homework assignment. After they turn in the homework assignment during the next class, you can spend a brief time period discussing their thoughts regarding how they can go about strengthening their weak competencies, knowing that a variety of variables/conditions exist that can enhance or inhibit the process.

Please note that a PowerPoint file is available for download for this Learning Module. It is available at our website:

http://kozaigroup.com/ies.html
THE 90 MINUTE LEARNING MODULE

PROVIDING A CONTEXT OF UNDERSTANDING – 10 MINUTES

If you chose the “do not release report” in the administrator function on the IES online site, you will need to print out the students’ personal feedback reports and distribute them. If you released the feedback reports to the students, they can print them out themselves. In this case, make sure to inform the students to bring their feedback reports to class with them.

After distributing the feedback reports, share your thoughts and perspective about how one can best go about applying questionnaire results to one’s life in such a way that the process is a beneficial one. We could outline a brief lecture for you to follow, but we have found that sharing this information is best done from an instructor’s personal perspective about the issues we raised on page 7. The students will listen and learn, we feel, if this part of the class comes directly from the instructor’s personal point of view.

REVIEW THE IES FEEDBACK REPORT – 10 MINUTES

Following the information provided in pages 8-9, review with the students the information that is provided for them on their feedback reports. It may be tempting to want to jump right in to discuss the competencies themselves and what the scores mean, but we have found that it is better first to familiarize the students with the meaning of the overall scores for each dimension and for the entire inventory, and to help them understand who their scores are compared against, and to give them an idea of the varied demographic groups that have taken the IES.

REVIEW THE COMPETENCIES – 40 MINUTES

The feedback reports contain descriptions of each competency and how the student scored in comparison to those who have taken the IES. Theoretically, students should be able to read this information and learn from it on their own. We have found, however, that it is beneficial to go through each competency one by one, and to review the definition and meaning of each competency with the students. Review each of the competencies in an in-depth fashion, using multiple illustrations and engaging the students in discussion about each competency. In Appendix 1, we provide definitions of each competency along with brief case examples that can be used to illustrate each competency.
**Review the Competencies – 40 Minutes, Cont.**

We strongly suggest using your own intercultural experiences or experiences from others whom you know to illustrate the competencies. Personal “war stories” are always more interesting to students than illustrations or mini-cases from external sources.

**Conclusion and take-way – 20 Minutes**

1. Write *Can* on one side of the whiteboard, and *Cannot* on the other. Elicit from the students reasons why they believe these competencies can be developed and write those in the *Can* column.
2. Next, elicit from the students reasons why they feel these competencies cannot be developed, and write those under the *Cannot* column.
3. Our experience has been that students have differing views and opinions about what types of competencies can be developed and which are “wired in” and immutable. After facilitating the discussion, one approach you can use is to argue that both the “developable” and the “immutable” camps are both correct. That is, it is very difficult and uncommon for people to strengthen weak competencies, but there have been examples of this happening so we know that it is possible via personal motivation, fear of failure, crucible/transformational experiences, degree of value differences in the new culture and one’s native culture, etc.
4. Explore with the students how these variables can and do influence our attempts at strengthening weak competencies. We do this by sharing personal experiences from our consulting experience where we have seen people improve weak competencies.
5. Another effective way of illustrating crucible experiences and their impact on developing competencies is to show the video clip from the movie, “Gandhi,” where he is thrown off the train on his first visit to South Africa. Show the clip, and then provide the context for this incident by reading passages from pp. 49-52 from the book, “Freedom at Midnight” by Larry Collins and Dominique Lapierre (New York: Avon Books, 1975). Before this incident, Gandhi was a man seemingly devoid of any competencies associated with being a leader. However, this transformational experience triggered virtually overnight competencies that were either latent within him, or brand new.
competencies that he previously did not possess. This video clip is a great trigger for discussion regarding personal change, personal competency development, and the types of experiences that may be necessary to induce such change.

6. Have the students discuss the following in conclusion: “In what ways would living and working overseas be an experience that has the potential to transform a person, and thus increase their ability to develop new competencies or strengthen existing competencies?”

**HOMEWORK ASSIGNMENT – 10 MINUTES**

Ask the students to do the following:

1. Select one global competency from the IES that you feel would be most useful for you to be aware of and work on in order to increase your intercultural effectiveness.

2. Next, give them the following assignment: Make a plan for personal development in terms of strengthening this competency. Make your plan as practical and concrete as possible. Emphasize that this assignment will be kept confidential and no one will see their plans except you.

3. Have them email the plan to you. After you review their plans, during the next class briefly discuss your thoughts on how practical, “do-able,” and insightful the plans were in general without revealing the authorship of any of the plans.

Please note that a PowerPoint file is available for download for this Learning Module. It is available at our website:

  http://kozaigroup.com/ies.html
THE 3 HOUR LEARNING MODULE

PROVIDING A CONTEXT OF UNDERSTANDING AND REVIEWING THE IES FEEDBACK REPORT – 20 MINUTES

If you chose the “do not release report” in the administrator function on the IES online site, you will need to print out the students’ personal feedback reports and distribute them. If you released the feedback reports to the students, they can print them out themselves. In this case, make sure to inform the students to bring their feedback reports to class with them.

After distributing the feedback reports, share your thoughts and perspective about how one can best go about applying questionnaire results to one’s life in such a way that the process is a beneficial one. We could outline a brief lecture for you to follow, but we have found that sharing this information is best done from an instructor’s personal perspective about the issues we raised on page 7. The students will listen and learn, we feel, if this part of the class comes directly from the instructor’s personal point of view.

Following the information provided in pages 8-9, review with the students the information that is provided for them on their feedback reports. It may be tempting to want to jump right in to discuss the competencies themselves and what the scores mean, but we have found that it is better first to familiarize the students with the meaning of the overall scores for each dimension and for the entire inventory, and to help them understand who their scores are compared against, and to give them an idea of the varied demographic groups that have taken the IES.

REVIEW THE COMPETENCIES – 40 MINUTES

The feedback reports contain descriptions of each competency and how the student scored in comparison to those who have taken the IES. Theoretically, students should be able to read this information and learn from it on their own. We have found, however, that it is beneficial to go through each competency one by one, and to review the definition and meaning of each competency with the students. Review each of the competencies in an in-depth fashion, using multiple illustrations and engaging the students in discussion about each competency. In Appendix 1, we provide definitions of each competency along with brief case examples that can be used to illustrate each competency.
UNDERSTANDING IES PROFILES – 20 MINUTES

Another useful approach to assist the students in understanding their competencies is to share with them the implications of their general profiles. Ask the students to mark on their feedback reports whether they are above average or below average in general on each competency. Then, share with them the following profiles:

**Higher E / Higher IE / Higher H**

This profile describes individuals who are quite attentive to their social environment and quite interested in continuous learning—about themselves and others. They enjoy learning in general and tend to ask a lot of questions, observe, and read to satisfy their curiosity. They are likely to be very interested in foreign things and people. Developing relationships with others, including foreigners, is exciting and a means to more knowledge and understanding. Remaining objective during this learning process and being open to information without bias is natural and important to them. During this “journey” to understand, these individuals naturally confront people and places that are different from them. This can give rise to confrontation and uncertainty in the social environment. However, these individuals are psychologically strong and able to withstand the hardships and interpersonal differences that often arise. They’re very open to differences that might exist between them and others and are interested in learning about those differences and how they might help these individuals understand themselves better. They pay attention to others’ reactions to what they say and do. They reflect on their lives and experiences in order to gain self-knowledge. This self-knowledge helps them build and manage their interpersonal relationships more effectively.

**Higher E / Higher IE / Lower H**

This profile describes individuals who are quite attentive to their social environment and quite interested in continuous learning—about themselves and others. They pay attention to others’ reactions to what they say and do. They reflect on their lives and experiences in order to gain self-knowledge. This self-knowledge helps them build and manage their interpersonal relationships more effectively.
Developing relationships with others, including foreigners, is exciting and a means to more knowledge and understanding. Remaining objective during this learning process and being open to information without bias is natural and important to them. During this “journey” to understand, these individuals naturally confront people and places that are different from them. This can give rise to confrontation and uncertainty in the social environment. Unfortunately, at the same time these individuals are driven to explore the world around them and confront such differences, they are less able to withstand the emotional and psychological challenges it brings. As a result, they typically need “timeouts” in order to rejuvenate and continue their exploration. In severe cases, however, the individual might withdraw entirely from the situation and return to a more familiar environment, mentally (people with similar ideas) and/or physically (locations familiar to them). Their interest in learning is helpful to accumulate knowledge; however, it is less likely to change their views, as these individuals are not always open to accepting the differences they confront. Although their interest in learning and in developing relationships bodes well for their ability to connect with people different from them, their lack of openness will keep some of those relationships from reaching a deep level.

**Higher E / Lower IE / Higher H**

This profile describes individuals who are quite attentive to their social environment and quite interested in continuous learning—about themselves and others. They pay attention to others’ reactions to what they say and do. They reflect on their lives and experiences in order to gain self-knowledge. They enjoy learning in general and tend to ask a lot of questions, observe, and read to satisfy their curiosity. They might or might not be very interested in foreign things and people. Those who are more cosmopolitan usually are not that interested in developing actual relationships with foreigners, however. They might engage foreigners, but it is more in the interest in developing and learning new information than for the relationship itself. Although in general they have a great desire to learn as much as possible about themselves and others, they are more tentative about actually developing relationships. For these reasons, they are unable to really capitalize on their keen knowledge about themselves to develop and manage their interpersonal relationships.
Rather than engage foreigners in order to learn about them, they will be more likely to read about them or observe them through films, documentaries, or even in their countries; however, they will not likely reach out to the locals. Nevertheless, this discomfort, when experienced, does not create many negative consequences for these persons because they have a very resilient personality. Likewise, their openness toward others will encourage others to want to develop relationships with these individuals.

**Higher E / Lower IE / Lower H**

This profile describes individuals who are quite attentive to their social environment and quite interested in continuous learning—about themselves and others. They pay attention to others’ reactions to what they say and do. They reflect on their lives and experiences in order to gain self-knowledge. They enjoy learning in general and tend to ask a lot of questions, observe, and read to satisfy their curiosity. They might or might not be interested in foreign things and people. However, the interest is likely to be satisfied through reading and observing through films, documentaries, and much less likely, in the foreign country, itself. The interest stops short, however, of motivating them to actually develop relationships with foreigners.

They might engage foreigners, but it is more in the interest of developing and learning new information than for the relationship itself. Their preference for dealing with others who are similar to them, with similar values, and perspectives also curbs the breadth and depth of relationships that might be developed. They are much more comfortable learning from self-controlled circumstances (e.g., reading and watching) because engaging in interpersonal relationships can lead to conflict or communication problems that make these individuals feel very uncomfortable.

Avoiding these circumstances can be important because they are less able to withstand the emotional and psychological challenges they bring. As a result, if put in these situations they typically need “timeouts” in order to rejuvenate and continue their exploration. In severe cases, however, the individual might withdraw entirely from the situation and return to a more familiar environment, mentally (people with similar ideas) and/or physically (locations familiar to them).
Lower E / Higher IE / Higher H

People in this group are generally fairly satisfied with their current level of knowledge and are likely also fairly satisfied with their own personal development. Reading, observing, and traveling to places to learn new things is of less interest than developing social relationships. The interest in social interactions tends to be more for the enjoyment of the relationship than for learning about the person or their culture, if they are foreigners. Rather than paying particular attention to how others react around them or to other things that might be sources of significant learning, they usually are more interested maintaining the conversation. As social beings, they might easily connect with people similar or different from them. Differences such as ethnicity or culture might well attract their attention, though not as part of a conscious learning strategy. However, the relationship with those who are different from them is probably going to remain more superficial because they will lack the depth of information about the other that is required for a deeper, more enduring relationship. One of their best social “tools” is their openness to others—regardless of apparent differences. This puts others at ease and helps the development of networks and friendships. Individuals in this category are also quite resilient to the challenges they face if confronted with new situations, though their tendency is to avoid challenges that involve needing to learn and adapt to new environments.

Lower E / Lower IE / Higher H

People in this group are generally fairly satisfied with their current level of knowledge and are likely also fairly satisfied with their own personal development. Reading, observing, and traveling to places to learn new things is of less interest to them. These individuals tend to be fairly satisfied with their current relationships also. Because they are not particularly interested in expanding their learning and understanding in general, most of their relationships will tend to be family members or others who have been in close proximity to them over time. Differences in others’ ethnicity, culture, or language are not particularly attractive. They prefer similarities and things that are familiar to them. Rather than expend effort to develop social networks and seek social interactions, then, they are more likely to engage in solitary activities they enjoy. Nevertheless, despite the fact that people with this profile are not attracted toward learning experiences or people and things
that are foreign to them, they are resilient to the challenges they face as part of normal life. In addition, even though they do not particularly feel a need to be around others and develop those relationships, their tendency to be open and accepting of differences attracts others to them, thereby expanding their network of relationships more than would be natural to them.

**Lower E / Lower IE / Lower H**

People in this group are generally fairly satisfied with their current level of knowledge and are likely to be fairly satisfied with their own personal development. Reading, observing, and traveling to places to learn new things is of less interest to them. These individuals tend to be fairly satisfied with their current relationships also. Most of these relationships will tend to be family members or others who have been in close proximity to them over time. Rather than expend effort to develop social networks and seek social interactions, they are more likely to engage in solitary activities they enjoy. Differences in others’ ethnicity, culture or language are not particularly attractive, either. Preferring the familiar, they usually have not developed the emotional stamina necessary to confront people and things that are different from them and deal effectively with them. In addition, they tend to be less open to differences, being somewhat quick to draw conclusions that reinforce their existing opinions. Not having taken advantage of developing their social skills, this and their tendency to be closed toward others negatively affects the quantity and quality of their relationships.

**Lower E / Higher IE / Lower H**

People in this group are generally fairly satisfied with their current level of knowledge and are likely also fairly satisfied with their own personal development. Reading, observing, and traveling to places to learn new things is of less interest than developing social relationships. They have a natural interest in people, but probably more from a social need than an intellectual interest. Their interest in social interactions tends to be more for the enjoyment of the relationship than for learning about the person or their culture if they are foreigners. Rather than paying particular attention to how others react around them or to other things that might be sources of significant learning, they usually are more interested simply maintaining the conversation and developing the relationship. As social beings, they might easily connect with people similar or different from them. However, the relationship with those who are different from them is probably going to
remain more superficial because they will lack the depth of information about the other that is required for a deeper, more enduring relationship. Differences such as ethnicity or culture might well attract their attention, though not as part of a conscious learning strategy. Unfortunately, at the same time these individuals are often attracted to others who are different from them, they are less able to withstand the emotional and psychological challenges it brings. As a result, they typically need “timeouts” in order to rejuvenate and often take their timeouts by reverting to interacting with people or things or going to places with which they are already familiar.

**BREAK – 10 MINUTES**

**CLASS DISCUSSION – 30 MINUTES**

1. Write *Can* on one side of the whiteboard, and *Cannot* on the other. Elicit from the students reasons why they believe these competencies can be developed and write those in the *Can* column.

2. Next, elicit from the students reasons why they feel other competencies cannot be developed, and write those under the *Cannot* column.

3. Our experience has been that students have differing views and opinions about what types of competencies can be developed and which are “wired in” and immutable. After facilitating the discussion, one approach you can use is to argue that both the “developable” and the “immutable” camps are both correct. That is, it is very difficult and uncommon for people to strengthen weak competencies, but there have been examples of this happening so we know that it is possible via personal motivation, fear of failure, crucible/transformational experiences, degree of value differences in the new culture and one’s native culture, etc. Explore with the students how these variables can and do influence our attempts at strengthening weak competencies. We do this by sharing personal experiences from our consulting experience where we have seen people improve weak competencies.

4. Another effective way of illustrating crucible experiences and their impact on developing competencies is to show the video clip from the movie, “Gandhi,” where he is thrown off the train on his first visit to South Africa. Show the clip, and then provide the context for this incident (available on pp. 49-52 from the book, “Freedom at Midnight” by Larry Collins and Dominique LaPierre, New York: Avon, 1975).
Before this incident, Gandhi was a man seemingly devoid of any competencies associated with being a leader. However, this transformational experience triggered virtually overnight competencies that were either latent within him, or brand new competencies that he previously did not possess. This video clip is a great trigger for discussion regarding personal change, personal competency development, and the types of experiences that may be necessary to induce such change.

5. Have them discuss the following in conclusion: In what ways would living and working overseas be an experience that has the potential to transform a person, and thus increase their ability to develop new competencies or strengthen existing competencies?

**CASE ANALYSIS – 45 MINUTES**

At this point in the class, we like to have the students assess global competencies in people interacting in real or fictional cross-cultural situations. A variety of excellent cases exist for this purpose; we recommend the following:


**Red Cross Children’s Home: Building Capabilities in Guyana (A).** Joerg Dietz, Michelle Goffin, Alan Marr. Ivey Publishing. University of Western Ontario. (Note: There is an excellent 22-minute video that accompanies this case).


The instructor’s notes for each case emphasizes differing learning objectives; however, in relation to the IES, we ask the students to discuss the following issues:

*Which competencies from the IES would you guess the main character was strong in, and which were his/her weak ones?*

*Flesh out the relationship between competencies, behavior, and outcomes.*

*What would the main character have to do, what actions must he/she take to improve or compensate for their weaker competencies and to better deploy their stronger competencies?*
PERSONAL DEVELOPMENT PLANNING – 15 MINUTES

In the final portion of the class, distribute the handout in Appendix 2 to the students. Alternatively, this could be distributed and be given as a homework assignment to turn in later. This assignment can be given as a hypothetical assignment, or as we will discuss in the next section, an actual ongoing assignment in which they report their progress. Act in a personal coaching role, and have them following the instructions (a copy of Appendix 2 is below):

### Assess:
Select one or two competencies from the IES that you feel would be most useful for you to work on in order to increase your effectiveness in intercultural interactions.

1. 
2. 

### General Plans:
General plans involve broad approaches to help one focus on areas to improve upon, e.g., “Develop an above average level of communication with the people I will be living and going to school with in Spain during my study abroad trip.”

### General Plans for Strengthening Intercultural Competencies

### Tactics to Achieve Plans:
Tactics are the concrete, detailed, “how-tos” that will enable you to achieve your plans, e.g.: I will study the language 15 minutes in the morning, and 15 minutes in the evening every day, and will practice what I learn daily by speaking what I have learned to three different natives every day.”

### Who will I report my experiences to in order to hold myself accountable for my learning?

### When will I report to them?

### How will I report to them?
The IES can be used at the beginning of the semester to provide a beginning reference point for subsequent personal development throughout the course of the semester. It can be administered the first week of class before any instruction takes place, and during the second class session, the class can be debriefed regarding their scores relating to the global competencies that the IES measures.

You can then have the students develop a personal development plan in terms of developing a competency and they can work on it throughout the semester. Thus, in addition to covering theoretical and empirical content in your class, you can also have a behavioral/developmental component as well. The IES can also be used in a pre-test/post-test fashion to measure whether any competency development took place during the course of your class. This is especially useful if you teach in a business school that is AACSB-accredited, as it is a perfect “assurance of learning” assessment for your course. A sample course syllabus entry is given below:
**PERSONAL GLOBAL COMPETENCY DEVELOPMENT ASSIGNMENT**

**Sample Description:** Students will enhance an existing global competency by engaging in a personal development program. Select a competency that you would like to improve. Develop a concrete plan of how you can improve the competency. Report to the instructor each week during the semester on Monday mornings, via email, on your developmental experiences. In these emails, feel free to update your plan based on your progress. At the end of the semester, provide a three-page summary of your progress and the insights you gained from the process. The professor will evaluate each student’s personal assessment program at the end of the semester. Each student’s progress reports will be kept strictly confidential.

<table>
<thead>
<tr>
<th>Assessment of Learning</th>
<th>Below Expectations</th>
<th>Meets Expectations</th>
<th>Above Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of performance in execution of personal intercultural effectiveness development plan</td>
<td>Failure to consistently report on progress; analysis of progress superficial; lack of ability to gain insight regarding leadership weakness; lack of progress in chosen intercultural competency.</td>
<td>Consistently reports progress; good analysis of progress that generates insights and self-learning; shows positive progress in developing chosen intercultural competency.</td>
<td>Consistently reports progress; superior analysis of experiences; powerful insights and self-learning reported from analysis; exceptional progress in development of chosen intercultural competency.</td>
</tr>
</tbody>
</table>

By giving the IES at the beginning of the semester, it also allows you to link intercultural competencies to the analysis of any subsequent case, model, or other issue that you discuss in class. For example, during a discussion of bribery case, you can pause, and ask the students to consider the following: “in this case, what competencies do you think Fred Sanders likely was strong in, and which do you think he was weak in?” “How did his competencies contribute to his decision to engage in behavior that violated his firm’s published code of conduct?” Continually linking current course content back to intercultural competencies allows you to trigger students to consider how individual decisions and behavior tendencies influence global business outcomes in an interesting and personal way.
Thank you for using the IES. Please provide us with feedback regarding your experience in using it in your class.

**CONTACT INFORMATION:**

Allan Bird: bird@kozaigroup.com

Mark Mendenhall: mendenhall@kozaigroup.com

Gary Oddou: oddou@kozaigroup.com

Michael Stevens: stevens@kozaigroup.com

Please note that Appendices 1 and 2 follow this page.
APPENDIX 1

SELF-AWARENESS: DEFINITION

This dimension measures the degree to which one is aware of one’s personal values, strengths, weaknesses, interpersonal style, and behavioral tendencies, as well as the impact of these things on other people. It also assesses the degree to which one reflects on this knowledge in order to engage in personal development and learning activities.

SELF-AWARENESS: ILLUSTRATION

Greg Martin put down the telephone receiver with a silent curse. Why do they always have to entertain me? He was looking forward to a quiet evening where he could relax from the day’s negotiations and psychologically regroup. All he wanted to do was order room service and watch CNN—the only English language channel on the television in his hotel room in Taipei. But he had just gotten a call that Mr. Chan had a dinner planned for him and would pick him up in half an hour. Larry got in the shower and took a deep slow breath, and said to himself: “It’s just your introvert talking, Greg.” Greg had learned from taking a battery of psychological profiles while working on his MBA that he was heavily oriented toward introversion. He translated the social scientific definition in his mind in the following way: “You like people, and you like to be around people, but after awhile you don’t gain energy from them. You need personal down time to recharge your batteries.” “Yep,” Greg thought to himself as he hopped into the shower, “they don’t understand that, and how could they? I would rather relax in the hotel room, but going out to dinner is part of business to them. Just roll with it. You’ve done it before lots of times.” When the phone rang half an hour to the minute it had rung before, Greg put a positive tone into his voice: “I’m really looking forward to the time we can spend together tonight—I’ll be right down.” In the elevator Greg chastised himself a bit for lying, but then realized he hadn’t lied—no, it was his intention to enjoy the evening, even if it wasn’t his natural choice to go out tonight.

SELF-AWARENESS: LEARNING

Greg was self-aware of his introversion: He doesn’t like to constantly socialize and be with other people 24-7, though he does like human interaction in doses—especially in the business realm. Rather than let the invitation that violated his preferences anger or depress him, because of his self-awareness he was able to “catch” what was going on inside himself and redirect the emotion towards a more positive strategy.
**EXPLORATION: DEFINITION**

The extent to which one is open to and pursues an understanding of ideas, values, norms, situations and behaviors different from one’s own. It reflects a fundamental inquisitiveness, curiosity, and an inner desire to learn new things. It also reflects one’s willingness to seek out new experiences that can cause learning or a change in one’s perspective and behavior, and the ability to learn from mistakes and to make adjustments to one’s personal strategies to ensure success.

**EXPLORATION: ILLUSTRATION**

Janet Long had been in Japan for three months. She was a “fast-tracker” in her Fortune 100 company, and when she heard about the two-year developmental assignment option for exposure to the global operations of the firm, she jumped on it. She had heard that there was a danger of being “out of sight out of mind” of the powers that be in headquarters if she went to Singapore, but she didn’t care. Janet’s view was: 1) whether or not I stay with the firm, global business expertise is going to be a must wherever I am at in terms of rising to the top—and once I get there to know what I am doing; 2) the thought of living in Singapore and traveling on business to various other Asian countries from that location intrigued her; 3) there were excellent Executive Education programs available in Singapore from top business schools—she could kill two birds with one stone on this assignment—develop global savvy and enhance her Yale MBA training. When her colleagues asked about what her plans were, her consistent reply was, “Sign me up. I can’t wait to get started.”

**EXPLORATION: LEARNING**

Janet Long is an example of someone who exhibits a high level in the competency of Exploration. In fact, her inquisitiveness and desire to learn new things—not just facts, but processes and people and from multiple sources, including personal experience, is a potent predictor of intercultural effectiveness in social and work environments where cultural diversity exists. Her desire to learn buffers any fears she might have regarding the experience, and her entire intention for taking the assignment is to learn.
GLOBAL MINDSET: DEFINITION

The degree to which one is interested in and seeks to actively learn about other cultures and their people. This learning can take place from newspapers, the Internet, movies, foreign media outlets, course electives in school, or television documentaries. The degree to which one proactively seeks out these outlets to expand one’s global knowledge about people and their cultures reflects the strength of one’s global mindset. Global mindset provides the basis upon which one can interact more effectively with people from other cultures.

GLOBAL MINDSET: ILLUSTRATION

Frank Simmons took a job a year ago in Dalton, Georgia, in the Southeastern part of the U.S. He was surprised at the number of Hispanic immigrants who lived in the city. In the past five years, a significant increase in the Hispanic population had occurred, and Frank, a middle manager at a carpet mill that hired many Hispanic employees, found himself in a multicultural community in Northern Georgia. He is not a direct report for any Spanish-speaking employee, but Frank finds the cultural infusion in both the community and his plant fascinating. Whenever he runs into a person of Hispanic descent who speaks English well, he peppers the person with questions, such as: “Where are you from? What challenges does the average non-English speaking blue-collar worker face in Dalton? What do you miss about Mexico? What aspects of life in Dalton do you especially enjoy?” Frank feels that it would be interesting and perhaps wise in the long term to learn Spanish—at least enough to converse with some of the employees about their families, hobbies, etc. Frank had been planning a vacation this summer in Destin, Florida, but he recently has decided to travel somewhere different instead. Sharing his idea with his wife, Jane, he opened the negotiations with the following statement: “I wonder how cheap the flights are from Atlanta to Puerto Rico?”

GLOBAL MINDSET: LEARNING

Frank exhibits a strong Global Mindset even though he has not been overseas all that much in the past and is not technically a “globetrotting businessman.” He is quick to observe the subtleties of the Hispanic culture in Georgia, and yearns to be able to communicate in more in depth and nuanced ways with Spanish speakers. His world around him actually is a mother lode of information to be mined, understood, and then integrated into his mind. His natural inclination is to study, integrate, and assimilate information.
**RELATIONSHIP INTEREST: DEFINITION**

The extent to which one is likely to initiate and maintain positive relationships with people from other cultures. It measures the degree to which one is inclined to seek out others in new cultures in order to build relationships, as well as the desire and ability to maintain those relationships once they have been created. It also measures whether engaging others is an energy-producing or energy-depleting activity. One’s willingness to use a foreign language in developing new relationships is also an important part of Relationship Interest.

**RELATIONSHIP INTEREST: ILLUSTRATION**

John Little found himself alone in a first class train cabin on the way to a business trip to Kaiserslautern, Germany. The second class cars had gradually filled up over a series of stops and were now full of “fussball” (soccer) fans on their way to the match. The train stopped again, and a man in his sixties, about 20 years older than John, entered his cabin and sat down. John hesitated a bit, but thought the man might be on his way to the soccer match, and that this would provide a good chance to practice his German. Also, maybe the man might be someone who John would like to develop an ongoing relationship with—John’s yearly Christmas card list included names of people he had met randomly around the world with whom he had developed relationships during vacations and business trips. The man was surprised when John asked him if he was going to the soccer match in German, and was even more surprised that an American was interested in German professional soccer. They had a pleasant conversation and parted ways at the Kaiserslautern train station, the man to his soccer match, and John to his business meeting.

**RELATIONSHIP INTEREST: LEARNING**

John, for whatever reason, is internally motivated to initiate behaviors that could lead to friendship development. He invests in the effort to initiate relationships, and once they are initiated, he maintains them. Individuals who naturally are inclined to do this are more successful overseas than those who do not have this inclination and behavioral tendency. “Connecting” with others is a key to successful international business negotiations, managing diverse and multicultural work teams, and living and working overseas as an expatriate. Having concrete strategies designed to develop relationships, and the willingness to use a foreign language to enact those strategies – even if one is not fluent – is an important competency in intercultural interaction.
EMOTIONAL RESILIENCE: DEFINITION

The extent to which a person has emotional strength and the ability to cope with challenging emotional situations. Psychological hardiness that allows the global manager to get through hard times.

EMOTIONAL RESILIENCE: ILLUSTRATION

The group of German managers erupted in laughter. Punctuated by the laughter were words spoken very quickly that Renata Souza could not understand. Renata had just offered a toast at the group’s favorite table at their favorite biergarten, and she felt her face flush and her body temperature exude warmth. She felt a bit dazed. Juergen was now patting her on her shoulder and saying something she could not understand. She had to communicate with her German peer managers in English, her second language, while on this three month assignment from her company in Brazil. She was here to liaison between the German firm’s manufacturing arm and the Brazilian sales office. The laughter died down, and the group’s attention now swung to the wild cheering that had just erupted as a goal had been scored in a “fussball” (soccer) match that was being televised. The conversation around the table turned to good-natured arguing around whether the goal scorer had been offside or not. Renata joined in, taking the side that the player had been offside, and that the referee’s decision was outrageous.

EMOTIONAL RESILIENCE: LEARNING

The illustration above gives us some clues about the emotional resilience of Renata Souza. Any human being responds emotionally when they believe they have made a social faux pas. In this case, Renata realized she said something that generated laughter, but she is not sure what she said, how inappropriate it was, or whether it was really a big deal or not. She did not spend too much time agonizing over it, or trying to pull herself together by excusing herself. She jumped right back into the conversation at the first opportunity, rather than isolating herself from the group, becoming angry, or emotionally distancing herself from her peer managers. An important competency in intercultural interaction is to be able to bounce back from awkward social mistakes—because one is bound to make such mistakes in a new cultural environment.
OPENNESS: DEFINITION

This dimension evaluates two tendencies: 1) The extent to which a person is flexible or rigid in using a monocultural system when perceiving cultural differences, and 2) the extent to which the person automatically evaluates situations by that monocultural system or withholds judgment until they gather more information in order to accurately evaluate situations.

OPENNESS: ILLUSTRATION

Sarah White has been in Japan for four months and finds she is constantly annoyed at having to remove her shoes before entering houses, and many other types of buildings. She had heard about this custom before her one-year assignment for her company, and didn’t think much of it at the time. But after having to live 24-7 in a situation where this was something she had to do every day, she has come to despise having to engage in this behavior. She has now taken to making snide off-hand remarks about the custom to other expatriates whenever the topic arises in conversation—and she is often the one to bring it up in conversation whenever negative comments are made about Japanese or Japan in general among her expatriate peers.

OPENNESS: LEARNING

Sarah is evaluating a cultural difference based upon her own cultural system. Her tendency to continue to be annoyed at such a “stupid custom” reflects a low degree in the competency of openness. Someone scoring high in Openness would simply not evaluate aspects of the new culture negatively just because they are different from one’s own customs.

An individual who is strong in Openness would remain neutral about a seemingly strange event until perhaps understanding the reason for it later after person study. Individuals high in Openness would perceive strange events as simply being “a difference” in the two cultures.

Someone with a low Openness score is more likely to use negative words to describe things and people they encounter in novel situations: “stupid,” “dumb,” “outrageous,” “ridiculous,” etc. In contrast, someone with a higher score will more likely use neutral words: “unusual,” “different,” “interesting,” etc.
## Appendix 2: Personal Competency Planning

### Assess:

Select one or two competencies from the IES that you feel would be most useful for you to work on in order to increase your effectiveness in intercultural interactions.

1. 
2. 

### General Plans:

General plans involve broad approaches to help one focus on areas to improve upon, for example: “Develop an above average level of communication with the people I will be living and going to school with in Spain during my study abroad trip.”

### Tactics to Achieve Plans:

Tactics are the concrete, detailed, “how-tos” that will enable you to achieve your plans; for example, “I will study the language 15 minutes in the morning, and 15 minutes in the evening every day, and will practice what I learn daily by speaking what I have learned to three different natives every day.”

### Reporting Results:

Who will I report my experiences to in order to hold myself accountable for my learning?

When will I report to them?

How will I report to them?

### General Plans for Strengthening Intercultural Effectiveness

I will use the following tactics to achieve my plans for improving specific dimensions of intercultural competencies that I want to improve in: