A Resource Guide for Effectively Using the Intercultural Development Inventory (IDI)

Developed by
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IDI, LLC

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IDI, LLC
Inter cultural Development Inventory Resource Guide

Table of Contents

Key IDI Qualified Administrator Information .......................... 3
Core Concepts & Developmental Tools ................................. 25
IDI Guided Development: Best Practices ............................... 42
IDI Individual Profiles & Intercultural Development Plans (IDP’s) . 51
IDI Group Profiles .......................................................... 59
Cross-cultural Validity of the IDI ....................................... 66

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Key IDI Qualified Administrator Information
The development and testing of the Intercultural Development Inventory (IDI) spanned a number of years and involved the active support of a number of people: Diann Hammer, Neil Hammer, Debra Freathy, Michael Paige, Milton Bennett and Janet Bennett and Richard Wiseman along with (expert raters): Barbara Kappler, Judith Martin, Shelley Smith, Laura Paulson, Rhonda Petri, John Baldwin, Lina Larkey), and (interviewers:) Sabina Rehague, Jessica Gilbert, Karen Rosenthal, Jessica Vesper, Tracy Weber, Neity Bhavnani, Susan Finnegan, Kavita Munjal.
How to use the Intercultural Development Inventory (IDI) Resource Guide

You are receiving this IDI Resource Guide because you are either registered and will be completing the IDI Qualifying Seminar offered by IDI, LLC or you are already a Qualified Administrator and you wish to update your knowledge, skills and resources in using the IDI in organizations and educational institutions.

This Resource Guide includes Critical Information that will help you deepen your understanding and skills in using the IDI.

Also included are IDI Handouts that you can copy and hand out to IDI respondents and decision-makers in your organization, per the guidelines listed earlier. The IDI Handouts are included for your review in this Resource Guide and are provided in the Resource Guide “Appendix” for photocopying/electronic PDF use.
Requirements for Licensure as an IDI Qualified Administrator (QA)

For Past IDI Qualified Administrators (QA’s)

If you are already an IDI Qualified Administrator, it is important to realize that your IDI QA licensure is an annual, renewable license. In order to maintain your IDI license, there are various activities, updates, and critical information guidelines on using the IDI that are posted on our website: www.idiinventory.com, announced through our email contact with you, and available by contacting our office staff directly at: info@idiinventory.com or calling: 443-664-5350 or 443-664-5352. It is your responsibility as an IDI QA to regularly review this collective information in order to maintain your IDI license.

For Newly Registered IDI Qualifying Seminar (QS) Participants

If you are currently registered to take the IDI Qualifying Seminar (QS), please be aware that all of the steps listed below must be completed before you receive your IDI license (contact IDI, LLC for the most current list of licensing requirements):

1. Complete the IDI Questionnaire. Instructions from our staff will be sent to you to take the IDI. If you have recently (within the past six months) taken the IDI, please inform our staffs when you took the IDI and which group you were a respondent. Also indicate whether you received individual IDI profile feedback on your results.

2. Complete all Pre-QS readings, webinars, and other tasks. This will be electronically sent to you as the QS approaches.

3. Attend and complete the IDI Qualifying Seminar. Please note that leaving any portion of the QS or leaving early will necessitate your re-taking that portion of the QS when it is offered again before you receive your IDI license.

4. Following completion of the QS, you will need to complete the “My Accounts” page on the IDI v3 website. You will also need to check off on this page your agreement with the licensing agreements listed.

5. Complete a 30-minute, individual feedback session with a member of our staff of your own, IDI profile results. This feedback session is typically done via the telephone (or skype) with one of our senior IDI QA Feedback Facilitators. This feedback session is usually scheduled during the IDI Qualifying Seminar to take place within two weeks following the QS. Our Facilitators set aside time for your session. If you are unable to keep your scheduled appointment, we need 24 hours’ notice. Should you miss your scheduled appointment, and you have not called or emailed us within 24 hours, we will reschedule your session at no charge. If you miss a second scheduled appointment without 24 hours’ notice, there will be a charge (contact IDI, LLC office for current rate) for you to complete your feedback session. Upon completion of your individual IDI feedback session, this licensing requirement is fulfilled.
Post-Qualifying Seminar

Modeling Self-Development

We encourage you to use the customized, Intercultural Development Plan (IDP) we provide you when we give you feedback on your individual IDI profile results. Engaging in your own intercultural competence development reflects the kind of learning orientation needed by people you administer the IDI to and work with in helping them build their intercultural competence.

Post-Qualifying Seminar Virtual Session

About one month following the IDI Qualifying Seminar, you will be invited to attend a 1.0-1.5 hour virtual session led by our staff. This virtual session is only for your QS group and is designed to answer questions and provide assistance to you as you begin to use the IDI more extensively.

Meeting these requirements will allow you to use the IDI within the guidelines reviewed in the QA Resource Guide, on our website: www.idiinventory.com and from various electronic communication we send to you periodically.
The Annual IDI License: Permitted & Restricted Use of the IDI

The IDI annual license contains important information that should be reviewed each year. Your annual IDI license is activated upon successful completion of the IDI Qualifying Seminar. The information below focuses only on key information regarding permitted and not permitted usage of the IDI. The IDI license permits you to (1) administer the IDI to groups and individuals, (2) use IDI Group Profile Reports, provide Group Profile feedback and develop and implement training and other interventions based on IDI Group Profile results, (3) use IDI Individual Profile Reports and provide Individual Profile feedback, (4) deliver IDI based individual coaching based on the Individual Profile Report and the individual’s customized Intercultural Development Plan, (5) use the IDI for program evaluation purposes; defined as pretest/posttest or posttest only use of the IDI to test the impact of an intervention on the “experimental” group and/or to compare IDI pretest and posttest for “control” group(s) and the “experimental” group(s) respondents, and (6) use the IDI for basic research purposes, excluding any and all use of the IDI for purposes of validating, testing, or otherwise empirically supporting the development or use of other measures that purport to assess intercultural or cultural competence or sensitivity.

QA is restricted from using the IDI for personnel Selection purposes, to include Hiring Talent (identify & select talent for the organization, Placement of Talent: (assign individuals to positions or new responsibilities within the workforce), and/or Promotion of Talent (identify & select individuals within the workplace for advancement). When such Selection services are requested, QA shall refer all inquiries to IDI, LLC. IDI, LLC would engage with the referring QA in a collaborative process if appropriate to use the IDI for personnel selection services.

QA is restricted from using the IDI for Baseline Assessment purposes to include larger group assessment of intercultural competence designed to meet one or more of the following criteria: (1) take a “snapshot” of the organization as a whole or major unit(s) within the organization, (2) involves multi-layer identification of subgroup IDI profiles, (3) as part of or a measure of Engagement, Climate or Accreditation surveys, and (4) involves multiple interviews and/or focus groups conducted to identify major unit(s) or organization-wide goals and challenges. You are prohibited from conducting IDI Baseline assessments unless you possess the set of competencies and implementation “best practices” required in conducting large-scale, IDI Baseline assessments. In order for us to know whether you possess the competencies and best practices needed for IDI Baseline assessments, we ask you to complete the IDI Baseline Assessment Competency Guide (found on the IDI website on the QA Resource Page). Once completed, you would contact IDI, LLC and discuss your responses to the Guide with us. This Guide asks you to rate yourself on key Baseline assessment competencies and best practices. Your self-rating on these critical competencies is the mechanism by which IDI, LLC can permit you, as a QA, to conduct an IDI Baseline assessment. Your self-ratings also identify competencies and best practices that you may need support in order to successfully complete IDI Baseline assessments (note that competencies or best practices you identify as “in need of support” can be provided by IDI, LLC or another current QA in specific Baseline assessment projects).

Your honest self-ratings are essential, as this is one aspect of maintaining your IDI license in “good standing.” When such Baseline Assessment services are requested, QA shall refer all inquiries to IDI, LLC. IDI, LLC would engage with the referring QA in a collaborative process if appropriate to use the IDI for Baseline Assessment.
The Annual IDI License Renewal: Maintaining Your IDI License

Once you complete the IDI Qualifying Seminar, you then maintain your IDI license in good standing by completing the required annual IDI license update process. Beginning in 2013, there is an annual IDI license update designed to insure you continue to have the most recent knowledge & best practices for using the IDI.

This annual license update must be completed no later than December 31st of each year. *If you do not successfully complete the annual license update within each year, your annual IDI license would expire after which you would need to retake the IDI Qualifying Seminar.*

The annual IDI license update is scheduled to be made available online and includes access to updating webinar(s), virtual workshop(s), streaming video(s), written and/or other materials. There is no annual IDI license fee for 2013 or 2014 (note: QA must successfully complete the annual IDI update to maintain IDI license).

The IDI annual license update ensures all QAs are able to deliver the most current and up-to-date information and best practices of the IDI.
Are There Other Uses of the IDI that are not Permitted?

To answer this question, we have put together a short FAQ on this topic. This is critical information as it clarifies appropriate use of the IDI consistent with your IDI licensing agreement. This list is not necessarily comprehensive, so if you are thinking about using the IDI in ways not discussed in our Qualifying Seminar or on the QA Resource Library page on our website, wwwIDIinventory.com, please contact the IDI LLC office for clarification. Remember, QAs are restricted in using the IDI for selection (hiring, placement, promotion) or baseline assessments (see IDI license agreement for details). Below are some uses of the IDI, however, that are simply not permitted.

Can I use the IDI for selection or for baseline assessment?
No. The licensing agreement explicitly identifies and defines selection (hiring, placement, promotion) as uses of the IDI that can only be done by IDI, LLC. QAs are permitted to conduct baseline assessments if they possess the requisite core competencies identified on the IDI Baseline Assessment Competency Guide (found on the IDI website on the QA Resource Page). Before undertaking any baseline assessment, QA’s must complete this Guide. Should you decide to refer selection or baseline projects to IDI, LLC, we will look for ways to collaborate, if appropriate, with you.

Can I use the IDI to validate other assessment tools/instruments?
No. The IDI cannot be used to validate other assessment tools. IDI, LLC is focused on helping individuals, groups, organizations and communities develop increased intercultural competence – and this effort is done through the use of the IDI along with the innovative approach of IDI Guided Development®. The IDI is a unique and already cross-culturally validated measure of intercultural competence. The theoretic underpinnings of the IDI and the methodology employed in the IDI measurement of intercultural competence do not ‘break down’ intercultural competence into such elements as knowledge, attitude or skill domains the way other instruments may do. As such, the IDI is not appropriate for validation purposes for other assessment tools. The IDI needs to be used in ways that are theoretically consistent and consistent with licensing requirements.

Can I shorten the IDI to fewer than 50 core items?
No. The 50 questionnaire items in the IDI cannot be shortened or changed in any way by QAs or others. QAs are permitted to add up to six customized demographic questions and remove any existing demographic questions on the IDI.

Can I translate the IDI into other languages not currently supported by IDI, LLC?
No. QAs or other individuals cannot translate the IDI into other languages. Only IDI, LLC is authorized to conduct appropriate “back translation” protocols of the IDI into other languages.

Can we remove the IDI, LLC logo or not include some of the information on the IDI reports or Intercultural Development Plans?
No. The IDI, LLC logo and accompanying information cannot be removed or changed on the IDI or any IDI reports or Intercultural Development Plans. The various IDI reports and Intercultural Development Plans have been designed
so the respondent receives the most accurate information in ways that are consistent across respondents and administrations of the IDI.

*Can I change the contexting questions in the IDI?*

No. The contexting questions must remain as written. You can request to add on the v3 website a fifth, program evaluation contexting question that concerns the impact of a specific program if you wish. While you may delete the contexting questions, we highly discourage you to do this as you eliminate any possibility for reviewing respondents’ answers if you should decide to provide individual IDI profile feedback at some later time.

*Can I give an individual his/her individual IDI report without providing feedback?*

No. The individual IDI profile report cannot be given to respondents unless those individuals receive a feedback session from you (or another QA) reviewing the results with the respondent of his/her individual IDI profile report.

*Can I withhold giving a respondent his/her own IDI Individual Development Plan after I give that person feedback on his/her individual IDI profile report?*

No. Upon completion of the IDI individual profile report feedback session, the respondent must be given his/her own, Intercultural Development Plan for review – whether additional coaching is provided by the QA or not. Our mission is to build intercultural competence with the IDI; the customized Intercultural Development Plan is required to be given to respondents if they receive individual IDI profile feedback.

*As a consultant, can I price the IDI differently for my clients?*

No. QAs using the IDI must disclose to their clients the actual, current price of the IDI paid by the QA. QAs are not permitted to charge their clients a different price for the IDI than the stated value of the IDI.

*As a consultant, can I charge a client additional fees for the IDI reports or for the Intercultural Development Plans?*

No. QAs cannot charge clients additional money for any IDI report or Intercultural Development Plan. In short, the pricing of the IDI must be accurate to what the QAs pay for the IDI (and accompanying reports) and made transparent to the client or respondent. Of course, consultants can charge what they wish for their time and effort.

*As a consultant, can I discourage clients or others if they wish to have their own employees become QAs?*

No. Should clients or IDI respondents wish to have their employees trained to use the IDI, QAs are obligated to refer such clients or respondents to IDI, LLC for additional information. We have found that consultants who facilitate the use of the IDI in their clients’ organizations, including helping their clients become QAs, actually increase the value and working relationship between the consultant and the client organization.

*Can I, as a QA, train other people to give IDI feedback or do coaching with the Intercultural Development Plans?*

No. Under no circumstances are QAs permitted to train or permit non-QAs to use the IDI, to provide group or individual IDI feedback, and to provide coaching based on IDI profiles and/or Intercultural Development Plans.
As a QA, can I order IDIs and/or oversee a non-QA student’s (or other person’s) use of the IDI?

No. Because the student (or other person) will, ultimately, be representing the IDI and its results by, for example, either presenting IDI results (in class, a conference) or perhaps publishing research or writing about the IDI, the student is responsible for any errors, etc. that are made vis-à-vis the use of the IDI. Therefore, the student must attend the IDI Qualifying Seminar and qualify as a QA in order to use/research/write about the IDI. While you as a QA can certainly work with the student, the student must be a QA to use the IDI, analyze the IDI results and present information based on the IDI.

Can a non-QA conduct research using the IDI, analyze IDI data, or present or publish IDI results?

No. Only QAs are responsible for IDI data, its analysis, and its presentation or publication. QAs can collaborate with non-QAs in this process to analyze IDI data, prepare statistical or other analytical or research reports based on IDI data, or to present IDI results at conferences and/or in publications. However, ultimately, it is the QA who is responsible for appropriate use and interpretation of IDI data.
IDI, LLC Support Available to Qualified Administrators

The staff at IDI, LLC is available to help you. We offer a complete support package to help you most effectively use the IDI. These services currently include:

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
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<tr>
<td>✓ Personal IDI, LLC staff support.</td>
<td>Our staff can be reached 9:00am to 5:00pm, eastern standard/daylight time, USA, Monday through Friday by email (<a href="mailto:support@idiinventory.com">support@idiinventory.com</a>) or by telephone: 443-664-5350 or 443-664-5352. Contact us if you need help with the following:</td>
</tr>
<tr>
<td>o Navigate the IDI v3 analysis website (i.e., answering IDI analysis website technical questions).</td>
<td></td>
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<tr>
<td>o Interpret group or individual profiles that you may have questions about.</td>
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<tr>
<td>o Providing advice on how to present IDI profile results to individuals or groups who may be (or are) resistant in some way to their IDI profile feedback.</td>
<td></td>
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<tr>
<td>o Answer questions regarding the Intercultural Development Plans.</td>
<td></td>
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<tr>
<td>✓ The IDI website technical manual.</td>
<td>o This is found on the QA Resource page of <a href="http://www.idiinventory.com">www.idiinventory.com</a> and is very useful as it walks you through how to use the IDI analysis site.</td>
</tr>
<tr>
<td>✓ Our IDI website.</td>
<td><a href="http://www.idiinventory.com">www.idiinventory.com</a> has valuable information both on the public pages as well as specific resources only available to our QA’s. These specific resources are found on the QA Resource Page, after logging in using your assigned, IDI login information. These resources include:</td>
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<tr>
<td>o Intercultural Conflict Style (ICS) Inventory materials.</td>
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<tr>
<td>o Intercultural Development Inventory Resource Guide (this document).</td>
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<tr>
<td>o IDI technical manual.</td>
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<tr>
<td>o Guidelines for trademarks, copyright, referencing of IDI materials.</td>
<td></td>
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<tr>
<td>o Bibliography of IDI research and articles.</td>
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<tr>
<td>o Ph.D. dissertation abstracts that have used the IDI.</td>
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<tr>
<td>o Listing of IDI demographic questions, contexting questions.</td>
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<tr>
<td>o Sample letters, profiles and IDI best practices.</td>
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<tr>
<td>✓ Our IDI QA professional virtual community.</td>
<td><a href="http://www.idiconnections.com">www.idiconnections.com</a> is our professional development community specifically for IDI Qualified Administrators.</td>
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<tr>
<td>o Becoming an active member means that you gain access to many of our QA’s who can answer questions and help you problem solve situations you encounter in your use of the IDI.</td>
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<tr>
<td>✓ IDI conference.</td>
<td>There are times when we offer a professional conference for IDI Qualified Administrators.</td>
</tr>
<tr>
<td>o Our IDI conference typically features 30 or more presentations on cutting-edge best practices, skill building and research across a wide-range of organizations and educational institutions.</td>
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Additional, Fee-based IDI, LLC Services

We also provide additional support services. For these additional services, we charge either an annual subscription or if it involves consultation, an hourly rate. Below is a list of additional services and example consultation topics that involve additional fees (note, prices subject to change):

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>IDI Training Video, Practical applications of the Intercultural Development Inventory.</strong> As a Qualified Administrator, you can seamlessly access via the internet, this 27-minute video (Annual Subscription Fee).</td>
<td>This program engagingly explains the Intercultural Development Continuum and describes, with compelling personal examples, how individuals respond to cultural differences based on their developmental orientation. Further, you are able to have other individuals also view this video program, for example, prior to a group training or individual IDI profile feedback session, thus saving valuable time. For more information, see our website: <a href="http://www.idiinventory.com">www.idiinventory.com</a> on the QA Resource Page.</td>
</tr>
<tr>
<td><strong>IDI Enterprise account</strong> for organizations with multiple Qualified Administrators (Annual Subscription Fee).</td>
<td>The Enterprise account includes services that are additional to that which is included in the individual QA licensing agreement. For more information, see our website: <a href="http://www.idiinventory.com">www.idiinventory.com</a> on the QA Resource Page.</td>
</tr>
<tr>
<td><strong>Customized organizational logo</strong> insertion in all IDI reports and Intercultural Development Plans (IDP's) (Annual Subscription Fee).</td>
<td>You are able to have your organizational logo automatically inserted in each and every IDI Group and Individual Profile report and each Intercultural Development Plan. Your organizational logo would be co-branded with the current, IDI, LLC logo. For more information, see our website: <a href="http://www.idiinventory.com">www.idiinventory.com</a> on the QA Resource Page.</td>
</tr>
<tr>
<td><strong>Private “in house” IDI Qualifying Seminar.</strong></td>
<td>IDI, LLC also conducts the 2.5 day, IDI Qualifying Seminar “in-house” for educational institutions and organizations. This is advantageous when your organization wants to train multiple individuals to be IDI Qualified Administrators. In this case, we send out our IDI QS instructor(s) to your location and conduct the QS for your group or people. For more information, contact our staff at IDI, LLC.</td>
</tr>
<tr>
<td><strong>IDI Qualified Administrator assessment, training materials &amp; consultation.</strong></td>
<td>We are continually developing additional materials to support your effective use of the IDI. Please check out website and the QA Resource Page to learn more. We also offering consulting services with our QA’s with various organizational &amp; educational clients.</td>
</tr>
<tr>
<td>Service</td>
<td>Description</td>
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| Example “technical” services billed at $75 per hour (check with IDI, LLC office for most current rate). | • Setting up your IDI username groups.  
• Generating and/or sending out usernames & passwords.  
• Sending to you group/individual profile reports & IDP’s.  
• Sending group and/or individual profile reports & IDP’s to your username respondents. |
| Example “non-technical” services billed at $125 per hour (check with IDI, LLC office for most current rate). | • How to “make the case” for using the IDI to your client, organization or education institution.  
• How to prepare & present group IDI profile feedback.  
• How to prepare & give individual IDI profile feedback.  
• How to design training and/or other interventions based on IDI profile results.  
• How to conduct coaching using the individual’s Intercultural Development Plan.  
• Giving individual, IDI profile feedback to your username group’s respondents on your behalf.  
• Giving group feedback as a co-facilitator on your behalf.  
• Conducting or co-facilitating focus group and/or individual interviews on your behalf.  
• Conducting or co-facilitating Intercultural Conflict Style (ICS) training on your behalf.  
• Provide you with individual coaching based on your own, customized IDI profile report and IDP. |
Using the IDI Across a Wide-Range of Situations (IDI Handout)

The IDI has been used in many situations, including the following:

- Top management in your organization wants you to develop a diversity program. You want to diagnose the current state of intercultural competence in your company and design a program that will move people towards greater ability in bridging across diverse cultural communities.

- Your university has recently inaugurated a “global competence” component to its curriculum. Your committee has to determine how to assess the impact of this new educational component among its students.

- Your organization has recently completed a major organizational change effort in which global management of cultural differences is a key ingredient for success. Now you have been asked to determine the impact of this change program.

- As a human service provider, you recognize that misunderstandings have arisen between your staff and members from the multicultural communities you serve. To build more positive relations, you want to begin intercultural training for all your staff that includes a focus on helping them more effectively communicate across diverse groups.

- You are responsible for developing intercultural proficiency within your newly created, global leadership program in your organization.

- You are tasked with developing pre-departure training for individuals from your organization who are about to embark on an overseas assignment.

- You work in a faith-based organization and you have seen increased cultural diversity within your immediate neighborhood. You want to better prepare your leaders and members to embrace the cultural diversity within the community.

- You are responsible for executive development of key leaders in your organization and they have asked you to help them better navigate domestic and international diversity challenges around the hiring and retention of diverse employees.

- Your educational institution wants to improve and expand offerings for their students in both study abroad and domestic service learning programs.

- Your organization or educational institution wants to increase its diversity among leaders, managers, faculty and staff.
Applications of the IDI® (IDI Handout)

Individual Level Development:

- **Individual Coaching**—The IDI individual profile provides useful feedback to individuals about how they engage cultural diversity and identifies issues that may be impeding them from bridging more effectively across cultural differences.

Group/Team Level:

- **Team Training**—The IDI group profile identifies a team’s primary way of engaging cultural diversity and is used for designing training efforts that target the intercultural competence development needs of the group.

Program Evaluation:

- **Pre/posttest or posttest only evaluation**—The IDI can be administered to individuals and/or groups prior to an intervention (e.g., training program) and again following completion of the designated intervention to determine the degree to which the intercultural competence of the participants has improved.

Research:

- **Research**—The IDI can be used for basic research.

Baseline Assessment (restricted use based on core competencies):

- **An Organizational snapshot**—The IDI, like an organizational climate, engagement or an educational accreditation survey, can provide a snapshot of the degree of intercultural competence within an organization or educational institution. This use of the IDI may only be undertaken in collaboration with IDI, LLC. Baseline Assessments can be used for:
  - **Organizational Development**—The IDI can provide an organization-wide profile by providing aggregate & subgroup level information concerning the intercultural competence.
  - **Training Needs Assessment**—The IDI profile results provide a training design template that allows educational and training interventions to be targeted for maximum effectiveness in developing intercultural competence and achieving organizational goals.

Personnel Selection (administered solely by IDI, LLC)

- The IDI may be used for personnel selection purposes, to include Hiring Talent (identify & select talent for the organization, Placement of Talent: (assign individuals to positions or new responsibilities within the workforce), and/or Promotion of Talent (identify & select individuals within the workplace for advancement). This use of the IDI may only be undertaken in collaboration with IDI, LLC.
Who Can Benefit from the IDI? (IDI Handout)

The Intercultural Development Inventory® can be effectively administered to a wide variety of people.

Use of the IDI® is not limited to only one cultural group (e.g., U.S. Americans, Japanese). The IDI is an effective and valid assessment tool across a wide range of culturally diverse groups, including different national cultures (e.g., Germans, Peruvians), different ethnic groups within a larger national context (e.g., European American, African American, Korean Japanese), and other cultural groups such as those related to social status, gender or age, for example.

In short, the IDI can be effectively used with anyone who interacts (in-person, virtual) or will interact with people who are from different cultural communities. These can include:

<table>
<thead>
<tr>
<th>People who live/work in culturally diverse organizations &amp; communities</th>
<th>People who interact or will interact in the future(face-to-face, virtual) with people from other cultures</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Educators, administrators &amp; staff in K-12 schools</em></td>
<td><em>Physicians, nurses &amp; other health care professionals</em></td>
</tr>
<tr>
<td><em>Professors, administrators &amp; staff in universities</em></td>
<td><em>Human resource managers &amp; employees</em></td>
</tr>
<tr>
<td><em>Managers &amp; employees in culturally diverse organizations</em></td>
<td><em>Social workers</em></td>
</tr>
<tr>
<td><em>Local neighborhood assistance organizations</em></td>
<td><em>Leaders in organizations</em></td>
</tr>
<tr>
<td><em>Marketing &amp; public relations specialists</em></td>
<td><em>Social workers</em></td>
</tr>
<tr>
<td><em>Interpreters &amp; translators</em></td>
<td><em>Lawyers, judges &amp; other legal professionals</em></td>
</tr>
<tr>
<td><em>English-as-a-second language teachers</em></td>
<td><em>Ministers, clergy &amp; other faith-based leaders</em></td>
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<tr>
<th>People preparing for short/long-term cross-cultural working or living</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Business people in international companies</em></td>
<td><em>Trainers, counselors, therapists &amp; consultants</em></td>
</tr>
<tr>
<td><em>Tourists</em></td>
<td><em>University, K-12 teachers, administrators, staff</em></td>
</tr>
<tr>
<td><em>Missionaries</em></td>
<td><em>International study advising offices in colleges</em></td>
</tr>
<tr>
<td><em>Non-governmental organization personnel</em></td>
<td><em>Study abroad program advisors &amp; administrators</em></td>
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<tr>
<td><em>Students</em></td>
<td><em>Immigrant &amp; refugee resettlement professionals</em></td>
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<td><em>Diplomats</em></td>
<td><em>Military personnel</em></td>
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<td><em>Family members who accompany cross-cultural travelers</em></td>
<td><em>Police &amp; other security professionals</em></td>
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<td><em>Postal workers &amp; other service delivery professionals</em></td>
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**Intercultural Development Inventory Resource Guide**

**Mitchell R. Hammer, Ph.D.**

**IDI, LLC**

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### Who Uses the IDI—a Partial List of Organizations . . . (IDI Handout)

#### Corporations
- Aon Hewitt
- ABB
- The Boeing Company
- Florida Power and Light
- General Electric
- Harley-Davidson
- Hyundai-Kia Motors
- *Mattel, Inc.*
- Microsoft
- Northrop Grumman
- POSCO
- Right Management
- Robert Bosch Engineering & Business Solutions
- Target
- Walt Disney Parks & Resorts

#### Not-for-Profit Organizations
- AARP
- AFS International Programs
- Boys and Girls Aid Society of Oregon
- Trinity Lutheran Church
- Council for International Education Exchange (CIEE)
- Kaiser Permanente
- Krista Foundation for Global Citizenship
- North Park Theological Seminary
- United Methodist Church
- Wilder Foundation
- YMCA

#### Colleges and Universities
- American University
- American University, Center of Provence
- Arizona State University
- Arkansas State University
- Bethel University
- Brigham Young University
- Bucknell University
- Chinese University of Hong Kong
- City University of Hong College of Business
- College of St. Catherine
- Colorado State University
- Columbia University Teacher’s College
- Cornell University
- Council for International Educational Exchange (CIEE)
- Duke University
- Fundacion Universidad San Jorge
- Georgia Institute of Technology
- Hennepin Technical College
- Indiana State University
- Iwate Prefectural University
- Kennesaw State University
- King College London
- Macquarie University
- Memorial University of Newfoundland
- Nappa Valley college
- NorQuest College
- Northwestern University
- Ohio State University
- Purdue University
- Queen’s University
- Texas A&M University
- Tokyo International University of America
- University of Minnesota
- University of North Carolina Chapel Hill
- Universidad de Monterrey
- Universidad Maastricht
- University of the Pacific
- University of Richmond
- Wake Forest University
- Xavier University

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Guidelines for Effectively Using the IDI

Following are ten guidelines that allow the IDI to be administered, analyzed and results presented to respondents and/or organizations in a professional and responsible manner.

1. **Familiarity with the Intercultural Development Continuum (IDC)**

   It is essential that anyone who administers the IDI be thoroughly familiar with the Intercultural Development Continuum (adapted Developmental Model of Intercultural Sensitivity, DMIS originally developed by Milton Bennett). Your understanding of the IDC should include viewing the IDI Training Video, *Practical Applications of the Intercultural Development Inventory* and careful reading of the following articles:

   

2. **Clear Understanding of the Cross-cultural Validity of the IDI**

   You should be familiar with how the IDI provides statistical support for the IDC (modified DMIS) as a model of intercultural competence. The IDI has employed scientifically agreed upon criteria for the design of a valid and reliable instrument that is generalizable across cultural groups. The IDI is not simply a “trainer feedback” survey. It meets extensive psychometric standards such that individual and group profiles of intercultural competence are valid and reliable across individuals and diverse cultural groups. It is important to understand the main protocols undertaken to produce an instrument that is credible in terms of social science assessment research. These protocols and their statistical results are presented in this Resource Guide, reviewed on our website: [www.idiinventory.com](http://www.idiinventory.com) and summarized in the following publications:

   

   In addition, there are over 70 publications and more than 66 Ph.D. dissertations that have used the IDI, providing independent confirmation that the IDI is a credible and useful measure of intercultural competence. A listing of these publications and Ph.D. dissertations are found on our website: [www.idiinventory.com](http://www.idiinventory.com).

3. **Culture-General Scope of the IDI**
The IDI is designed and validated as a “culture-general” measure of intercultural competence. The IDI asks individuals to respond to the items in the Inventory in terms of their “own culture” and “other cultures.” The IDI has been statistically validated to generalize across other cultural communities than the respondent’s own culture group. This means that the IDI provides a powerful and accurate profile of respondents’ orientations toward a wide range of “other culture” groups, including nationality, ethnicity, gender and other diversity categories. When we say the IDI is a culture-general assessment, it means the IDI is descriptive of a general orientation towards making sense of and responding to cultural differences generally and within particular cultural (group) contexts. This is because people tend to maintain cognitive consistency in the way they construe cultural differences both generally and specifically.

4. Confidentiality of IDI Responses

Using the IDI involves determining the confidentiality of responses. Whether using the IDI with individuals (reviewing a person’s own IDI profile results) or with groups (reviewing a group’s own IDI profile results), you should be clear with your respondents and clients exactly which people will have access to view a respondent’s individual or group’s IDI profile results. There is no “standard” confidentiality agreement IDI, LLC requires of IDI Qualified Administrators (QA’s) to adhere. Rather, it is the responsibility of the QA to establish confidentiality alignment with their organization or educational institution. Further, confidentiality of IDI profile results can take many forms. For example, if you are providing individual IDI feedback, confidentiality could refer to the protocol that only you as the IDI Qualified Administrator (QA) and the individual will have access to the person’s IDI profile. It is also possible that the confidentiality protocol could be that the QA, the individual respondent, and the respondent’s co-workers or even boss can review the respondent’s IDI profile report. What is critical is that you as the QA reach clear agreement on the specific terms of the confidentiality protocol that will be used with the individual and group IDI profile results before administering the IDI.

5. Determining How You will use the IDI

The main applications of the IDI fall into the following areas. Often, organizations and educational institutions pursue 1, 2 or all 3 areas when they initiate the IDI in their workplace:

- **For Individual Feedback and Development**: In this case, you are using the IDI to help develop the intercultural competence of specific individuals. This relies on providing each individual his/her individual IDI profile results and providing each individual with his/her own customized, Intercultural Development Plan (IDP). You may also decide to provide each individual who receives his or her profile feedback and customized IDP with follow-up coaching.

- **For Group/Team Feedback and Training Development**: In this case, you are using the IDI to increase a group or team’s intercultural competence. This relies on providing a Group IDI Profile report to the members of the team and to review the Group IDI Profile results with the group. Typically, following the Group IDI Profile feedback session, training that is developmentally designed based on the group IDI profile is implemented for the group members.

- **For Program Evaluation**: The IDI can be used for program evaluation, where you administer the IDI as a pretest, then conduct an intervention (e.g., a diversity training program) and then administer the IDI following the intervention (posttest) and perhaps again six months or a year later (post-posttest).
• **For research:** The IDI can be used in basic research efforts, excluding any and all use of the IDI for purposes of validating, testing, or otherwise empirically supporting the development or use of other measures that purport to assess intercultural or cultural competence or sensitivity.

• **For Baseline Assessments and Organization Development (restricted):** This use is restricted and can only be undertaken by meeting core competencies. In this application, the IDI is administered to all or a large number of staff in an organization or educational institution in order to baseline or benchmark their level of intercultural competence as a whole and within specific units or departments. This benchmarking is called by various terms, including an engagement or climate survey, an accreditation survey in education, a training needs assessment, and an intercultural audit. Information from these kinds of baseline assessments can be used to assess the readiness of the organization to engage in interculturally demanding efforts. This might include an expansion of business to other countries for a corporation. For a high (secondary) school, it might be providing quality education to an increasingly multicultural student body.

• **For Selection (restricted use only by IDI, LLC):** This use is restricted and can only be undertaken in conjunction with IDI, LLC. The IDI may be used for personnel selection purposes, to include Hiring Talent (identify & select talent for the organization), Placement of Talent: (assign individuals to positions or new responsibilities within the workforce), and/or Promotion of Talent (identify & select individuals within the workplace for advancement).

6. **Handling Resistance to Taking the IDI**

There are always individuals who simply do not like responding to any kind of survey or questionnaire. They may feel that “any sort of quantitative instrument cannot adequately reflect my own views.” There are also some people who are uncomfortable in responding to an assessment that asks their views about dealing with people from different cultures. The instructions for the IDI have been carefully prepared to help overcome resistance in these areas. Further, clarifying the confidentiality protocol may encourage reluctant participants to complete the IDI. Your own (or the organization’s) explanation of the purpose for administering the IDI and your willingness to discuss the IDI (after it has been completed) may help respondents feel more comfortable in taking the IDI. Finally, emphasizing that the results of a person’s participation in taking the IDI will be very helpful in identifying strategies for effectively bridging across cultural differences and commonalities can also reduce resistance to taking the IDI.

7. **Facilitating Learning to the Interpretation of IDI Profiles**

The IDI presents profiles concerning how individuals and groups construe cultural differences and commonalities. Some of the orientations of intercultural competence are more Monocultural and others are more Intercultural/global mindsets. Respondents may not believe or accept the results of the IDI in terms of their own IDI profile or their Group’s IDI profile results.

If a challenge should occur, an open discussion of the areas where the IDI results can be beneficial should be undertaken. Because the IDI has been so extensively validated across cultures, you can be confident that the IDI profile results are accurate for the individual or for the group. Your response to someone who challenges the
results of their individual or group profile should be supportive and help the individual or group more deeply understand how their Developmental Orientation as measured by the IDI provides an important filter through which they make sense of and respond to cultural commonalities and differences.

For instance if an individual (or group) objects to being “being labeled” (by the IDI), a number of strategies can be used. For example, let’s say someone objects to being “labeled” in Minimization and “in transition from a Monocultural to an Intercultural mindset,” the following topics should be stressed:

- The IDI does not provide a “label”—it tells you how you are currently approaching cultural differences and commonalities and gives you a direction in which to develop more intercultural competence;
- Connecting Minimization to specific goals and challenges the individual or group faces provides “evidence” from the individual’s or group’s own experience of the ways Minimization is guiding how they make sense of and respond to cultural differences and commonalities;
- None of the orientations are “good or bad” in themselves—they do give you an accurate picture of how you deal with cultural differences;
- The IDI profile results are valid and useful only in the context of dealing with intercultural matters—your profile is not a picture of your whole personality!

With these points made, the individual or group can consider how the results can be beneficial in guiding their further efforts in bridging across cultural differences and commonalities.

8. **Translating IDI Profiles into Positive Action Planning**

It is important that the IDI profiles provide a basis for positive action planning, or what we refer to as “IDI Guided Development®”. This can begin at the end of the individual IDI feedback session or the group IDI feedback session. You can start this discussion by asking the individual or group the question, “what do these results mean to you”? When giving an individual his/her own IDI profile feedback, it is required that you, as the QA, provide the individual with his/her own customized, Intercultural Development Plan (IDP) and minimally, review the five steps for building intercultural competence identified in the IDP. The IDP’s are designed to be self-directed learning; but having a QA act as a coach during this process of building intercultural competence we believe enhances this developmental process. If you are also providing follow-up coaching to the individual, then you can ask the respondent to complete steps 1 (and perhaps 2) before the next scheduled meeting.

9. **Ethical Uses of the IDI**

The IDI is not appropriate for everything. It is not a personality test, so clearly the results should not be used outside the context of intercultural (international, domestic, diversity) relations. For instance, if someone has an IDI profile in Denial, it means that he/she does not consciously think about cultural differences. It does not mean that the person is in denial about other kinds of relationships, or about drugs, or anything else. It is ethical to review the results of the IDI within the “range of application” of the theory and the IDI measurement.
It is also ethical to stay within your own professional limits. If you are not a trained therapist, be careful about raising issues with individuals or groups that might require psychological skills you may not possess. If you are not a trained facilitator, do not open up a discussion on a controversial topic that you might not be able to effective lead. And if you do not know a lot about intercultural communication concepts and practice, look to other trained interculturalists to help you conduct intercultural programs when you use the IDI.

10. Using the IDI for Selection Purposes

IDI Qualified Administrators are not permitted to engage the IDI as a selection tool (e.g., overseas assignments, leader hiring, study abroad directors). This restricted opportunity means that QA’s must refer selection use inquiries to IDI, LLC. IDI, LLC would then collaborate, if appropriate, with the QA. There are currently two major studies that have demonstrated predictive validity of the IDI. In one study, the IDI demonstrated strong predictive validity in success in diversity recruitment and hiring. In the second study, the IDI shows strong predictive validity for important study abroad outcomes (see Hammer, M.R. (2011), Additional cross-cultural validity testing of the Intercultural Development Inventory. International Journal of Intercultural Relations, 35, 474-487). Both of these studies offer evidence of the predictive ability of the IDI that speaks positively to using the IDI as part of a selection process.
Core Concepts & Developmental Tools
Key Concepts & Definitions of Intercultural Competence (IDI Handout)

1. **The Intercultural Development Inventory® (IDI®)**
   - The IDI is a 50-item, cross-culturally generalizable, valid and reliable assessment of intercultural competence. The IDI is available online and in paper versions and has been “back translated” into many languages.

2. **Intercultural Competence**
   - The capability to shift cultural perspective and appropriately adapt behavior to cultural difference and commonalities. This capability is conceptualized in terms of a range of orientations along the Intercultural Developmental Continuum (IDC) of intercultural competence.

3. **Intercultural Developmental Continuum (IDC)**
   - The Intercultural Developmental Continuum (IDC) identifies a continuum of orientations toward cultural differences and commonalities measured by the IDI. The IDC is adapted from the Developmental Model of Intercultural Sensitivity (DMIS) originally proposed by Milton Bennett. These orientations range from the monocultural orientations of Denial and Polarization (Defense/Reversal) through the transitional orientation of Minimization to the Intercultural/Global orientations of Acceptance and Adaptation.

4. **Cultural Disengagement**
   - Cultural Disengagement is the degree of disconnection or disengagement one has toward a primary cultural community. Cultural Disengagement is a separate measure within the IDI that is not aligned along the Intercultural Developmental Continuum (IDC). That is, Cultural Disengagement is not an intercultural competence dimension.

5. **IDI Guided Development®**
   - An innovative, comprehensive, assessment driven approach based on IDI individual and group profile results designed to build intercultural competence in order to achieve intercultural goals. This approach is a proprietary system based on IDI individual and/or group profile results and involves identification of goals, intercultural challenges (stress points), strategies used to address challenges and supports (kinds of support in the organization for developing intercultural competence).

6. **Diversity & Inclusion**
   - Diversity: The “mix” of differences around nationality, ethnicity, gender, age, physical abilities, sexual orientation, economic status, education, profession, religion, organizational affiliation. Diversity is assessed by determining representation of designated cultural/ethnic/other groups within an organization. Intercultural competence, as assessed by the IDI, is “how” the diversity “mix” is achieved.
   - Inclusion: Making the “mix” work. Establishing organizational structures, policies, systems and procedures to maximize engagement & contribution of diverse resources. Inclusion is assessed by identified organizational outcomes related to how well diversity is valued. These can include, for example, climate/engagement surveys, turnover rates, conflicts, promotional disparities, tenure decisions. Intercultural competence, as assessed by the IDI, is “how” inclusion in the workplace is achieved.

7. **Objective vs. Subjective Culture:**
8. **Race & Ethnic Group**

- **Race:** A group that is socially defined based on physical criteria (characteristics of genetic origin), (J. Jones, *Prejudice & Racism*).
- **Ethnic Group:** A group of people that is socially defined based on cultural criteria (value, beliefs, behavioral patterns) (J. Jones, *Prejudice & Racism*).

9. **Prejudice & Racism:**

- **Prejudice:** A negative feeling (antipathy) toward a group of people or individual members of the target group based on cultural stereotypes. The effect of prejudice is to put a target group or individual members of that group at a disadvantage not based on their own misconduct (G. Allport, *The nature of prejudice*).
- **Racism:** A social result through the exercise of power against a target group that is defined/treated as inferior by individuals and institutions. Power + Prejudice = Racism (J. Jones, *Prejudice & racism*).

10. **Cultural Stereotypes & Cultural Generalizations:**

- **Cultural Stereotypes:** Evaluative overgeneralizations that assign personal traits to a group of people. Stereotypes support a less complex set of perceptions & experience of cultural difference and commonalities.
- **Cultural Generalizations:** Neutral, relative descriptions of a group’s preferences typically shared by 55-85% of the people from a particular community. Cultural generalizations support a more complex set of perceptions and experience of cultural difference and commonalities.

11. **Intercultural (etic) Frameworks:**

- Culture general patterns of difference in interpretations and behavior that impact on how individuals and groups relate to one another. Culture general frameworks enable understanding of patterns of difference across culturally diverse groups.

12. **Culture Specific (emic) Frameworks:**

- Patterns of interaction within a cultural community that are described largely from the perspective of the culture group members. Culture specific frameworks enable more in-depth understanding of how a cultural interpretation (value, belief) or behavior functions within a specific cultural group.
Intercultural Competence is Essential

Research conducted on intercultural effectiveness, cross cultural adaptation and adjustment, international job performance, diversity & inclusion efforts, and other forms of intercultural contact (e.g., tourism, immigration, refugee resettlement), clearly identify intercultural competence as a key capability for working and living effectively with people from different cultures. Indeed, intercultural competence is essential for transcending ethnocentrism and establishing effective, positive relations across cultural boundaries both internationally and domestically.

Intercultural Competence is Well Established

Intercultural competence has been identified as a key capability in studies focusing on overseas effectiveness of international sojourners, international business adaptation job performance, foreign student adjustment, international transfer of technology and information, international study abroad and inter-ethnic relations within nations.

Intercultural Competence is a Central Fulcrum

In addition, intercultural competence is a central fulcrum for achieving such outcomes as (1) positive feelings toward people from different cultures, (2) positive feelings people from different cultures have about you, (3) completion of international task/job responsibilities, (4) reduced culture-contact stress-related ailments, (5) personal/family adjustment living in a foreign culture, (6) intercultural interaction, (7) professional effectiveness, (8) domestic diversity and inclusion goals for diversity recruitment, hiring and retention, (9) elimination of disparities between dominant and non-dominant culture students in high (secondary) school graduate rates, achievement scores, discipline actions, police reports, and special education placement practices, and (10) improved community relations in multicultural environments.

As Bhawuk & Brislin (1992) comment:

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To be effective (competent) in another culture, people must be interested in other cultures, be sensitive enough to notice cultural differences, and then also be willing to modify their behavior . . . (p. 416).

**Intercultural Competence—A Definition**

These international and domestic cross-cultural outcomes are achieved through the development of intercultural competence—the capability to shift cultural perspective and appropriately adapt behavior to cultural differences and commonalities (Hammer, 2009). This development of intercultural competence involves gaining a more complex understanding of how one engages cultural diversity—reflected in:

- Deeper cultural self-understanding (how one make sense of and respond to cultural differences in terms of one’s own culturally learned perceptions, values and practices), and
- Deeper cultural other-understanding (different ways people from other cultural groups make sense of and respond to cultural differences).

**Intercultural Competence is assessed by the IDI®**

This capability to shift cultural perspective and appropriately adapt behavior to cultural differences and commonalities—what we define as intercultural competence—is assessed by the Intercultural Development Inventory® or IDI®.

The IDI is the premier, cross-cultural assessment of intercultural competence that is used by thousands of individuals and organizations to build intercultural competence in order to achieve international and domestic diversity and inclusion goals and outcomes.

IDI research in organizations and educational institutions confirms two central findings when using the IDI:

- *Interculturally competent behavior occurs at a level supported by the individual’s or group’s underlying orientation as assessed by the IDI*

- *Training and leadership development efforts at building intercultural competence are more successful when they are based on the individual’s or group’s underlying developmental orientation as assessed by the IDI.*

The Intercultural Development Inventory (IDI Handout)
Mitchell R. Hammer, Ph.D.

The Intercultural Development Inventory®, or IDI® is a 50-item questionnaire, available online and in a paper-and-pencil format that can be completed in 15–20 minutes. A wide range of organizations and educational institutions use the IDI. Thousands of Qualified Administrators in more than 30 countries have extensively applied the IDI in corporate, not-for-profit and educational contexts. In addition, more than 60 published articles and book chapters as well as over 42 Ph.D. dissertations have been completed using the IDI.

The IDI also includes contexting questions that allow respondents to describe their intercultural experiences in terms of (a) their cross-cultural goals, (b) the challenges that they face navigating cultural differences, (c) critical (intercultural) incidents that they face when they encounter cultural differences, and (d) the ways they navigate those cultural differences. Responses to these questions provide a cultural grounding for relating IDI profile scores to the actual experiences of the individual.

After individuals complete the IDI, each person’s responses to the 50 items are analyzed and reports prepared that include the person’s written responses to the contexting questions.

An Organization and Education Version

The IDI is available in two different versions: one for use in educational institutions and the other in all other organizational settings. Each version is customized with different demographic questions as well as customized analysis of individual and group profile results.

Available in Multiple Languages

The IDI is available in English and many other languages. Each language version of the IDI has been rigorously “back translated” insuring both linguistic and conceptual equivalence in the meaning of each of the items.

Generates Customized Profile Reports

The IDI generates profiles of an individual’s and a group’s capability for shifting cultural perspective and adapting behavior toward cultural differences and commonalities—that is, their intercultural competence orientation. When used to assess an individual’s level of intercultural competence, an IDI Individual Profile Report is prepared for that individual. In addition, a customized, Intercultural Development Plan® (IDP®) is also prepared for the person. This IDP provides a detailed blueprint for the individual to further develop his/her intercultural competence.

The Intercultural Development Inventory can also be used to assess a group or organization’s overall approach to dealing with cultural differences and commonalities. Detailed group and subgroup reports are produced to provide the group or organization a comprehensive picture of intercultural competence.

When used to assess a group’s intercultural competence, interviews or focus groups can be conducted to identify cross-cultural goals and challenges, providing valuable information regarding how the group members’ IDI profile translates into interculturally competent strategies across diverse groups.
Provides an individualized Intercultural Development Plan (IDP)

The individual Intercultural Development Plan or IDP is developed by Dr. Hammer in response to many requests for strategies and interventions to help individuals increase their intercultural competence. The IDP is customized for each individual based on their own unique IDI individual profile and provides targeted personal action plans through a comprehensive 5-step developmental process. The IDP helps individuals gain:

1. Insight concerning intercultural challenges they face,
2. Clarity of intercultural goals important to them, and
3. Targeted, developmental learning that increases intercultural competence in bridging across diverse communities.

A Valid Assessment Tool

The Intercultural Development Inventory has been psychometrically tested and found to possess strong validity and reliability across diverse cultural groups. This validity includes predictive validity within both the corporate and educational sectors. The IDI has been rigorously tested and has cross-cultural generalizability, both internationally and with domestic diversity.

Psychometric scale construction protocols were followed to ensure that the IDI is not culturally biased or susceptible to social desirability effects (i.e., individuals cannot “figure out” how to answer in order to gain a higher score).

The IDI possesses strong content and construct validity. Recent studies also indicate strong predictive validity of the IDI. In one study within the corporate sector, higher levels of intercultural competence, as measured by the IDI, were strongly predictive of successful recruitment and staffing of diverse talent in organizations. In another study, higher IDI scores among students were predictive of important study abroad outcomes, including greater knowledge of the host culture, less intercultural anxiety when interacting with culturally diverse individuals, increased intercultural friendships, and higher satisfaction with one’s study abroad experience.

Applies IDI Results to Goal Achievement through IDI Guided Development®

The IDI is the assessment platform from which *IDI Guided Development®* is undertaken to build intercultural competence based on IDI profile results that guide the achievement educational and organizational goals.

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Ladder of IDI Guided Development®

IDI assessment to identify intercultural competence

Identification of cross-cultural goals & challenges

Targeted intercultural competence development efforts based on IDI profiles

Implementation of interculturally proficient solutions to achieve cross-cultural goals

The Intercultural Development Continuum (IDC) describes a set of orientations toward cultural difference and commonality that are arrayed along a continuum from the more monocultural mindsets of Denial and Polarization through the transitional orientation of Minimization to the intercultural or global mindsets of Acceptance and Adaptation. The capability of deeply shifting cultural perspective and bridging behavior across cultural differences is most fully achieved when one maintains an Adaptation perspective.

Denial

A Denial mindset reflects a more limited capability for understanding and appropriately responding to cultural differences in values, beliefs, perceptions, emotional responses, and behaviors. Denial consists of a Disinterest in other cultures and a more active Avoidance of cultural difference. Individuals with a Denial orientation often do not see differences in perceptions and behavior as “cultural.” A Denial orientation is characteristic of individuals who have limited experience with other cultural groups and therefore tend to operate with broad stereotypes and...
generalizations about the cultural “other.” Those at Denial may also maintain a distance from other cultural groups and express little interest in learning about the cultural values and practices of diverse communities. This orientation tends to be associated more with members of a dominant culture as well as members of non-dominant groups who are relatively isolated from mainstream society because both may have more opportunity to remain relatively isolated from cultural diversity. By contrast, members of non-dominant groups who are more actively engaged within the larger, mainstream society are less likely to maintain a Denial orientation, because they more often need to engage cultural differences. When Denial is present in the workplace, cultural diversity oftentimes feels “ignored.”

The intercultural competence development strategy for Denial is to help the individual or group notice and confront cultural differences. This can focus on those less threatening, more easily observed aspects of human behavior in areas of clothing, food, music, art, dance as well nonverbal behavior, customs, dos and taboos. Development is achieved for the individual or group by interacting more with people from different cultures—under supportive conditions. Also, asking individuals and groups to notice perceptions and behaviors that they have in common with—and are different from—people from other cultural communities is also useful.

Polarization

Polarization is an evaluative mindset that views cultural differences from an “us versus them” perspective. Polarization can take the form of Defense (“My cultural practices are superior to other cultural practices”) or Reversal (“Other cultures are better than mine”). Within Defense, cultural differences are often seen as divisive and threatening to one’s own “way of doing things.” Reversal is a mindset that values and may idealize other cultural practices while denigrating one’s own culture group. Reversal may also support the “cause” of an oppressed group, but this is done with little knowledge of what the “cause” means to people from the oppressed community. When Polarization is present in an organization, diversity typically feels “uncomfortable.”

The intercultural competence development strategy for individuals or groups at Polarization is to help them recognize when they are overemphasizing differences without fully understanding them; and, second, to help them search for commonalities and adopt a less evaluative stance toward understanding differences.

Minimization

Minimization is a transitional mindset between the more Monocultural orientations of Denial and Polarization and the more Intercultural/Global worldviews of Acceptance and Adaptation. Minimization highlights commonalities in both human Similarity (basic needs) and Universalism (universal values and principles) that can mask a deeper understanding of cultural differences. Minimization can take one of two forms: (a) the highlighting of commonalities due to limited cultural self-understanding, which is more commonly experienced by dominant group members within a cultural community; or (b) the highlighting of commonalities as a strategy for navigating the values and practices largely determined by the dominant culture group, which is more often experienced by non-dominant group members within a larger cultural community. This latter strategy can have survival value for non-dominant culture members and often takes the form of “go along to get along.” When Minimization exists in organizations, diversity often feels “not heard.”

When responsibilities and tasks in an organization or educational institution can be accomplished successfully using commonality strategies without the need to attend to difference, Minimization mindsets are reinforced. The intercultural competence developmental strategy for Minimization is to increase cultural self-understanding,
including awareness around power and privilege as well as other patterns of cultural difference (e.g., conflict resolution styles), culture-general frameworks (e.g., individualism/collectivism), and culture-specific patterns.

**Acceptance**

Acceptance and Adaptation are intercultural/global mindsets. With an Acceptance orientation, individuals recognize and appreciate patterns of cultural difference and commonality in their own and other cultures. An Acceptance orientation is curious to learn how a cultural pattern of behavior makes sense within different cultural communities. This involves contrastive self-reflection between one’s own culturally learned perceptions and behaviors and perceptions and practices of different cultural groups. While curious, individuals with an Acceptance mindset are not fully able to appropriately adapt to cultural difference. Someone with an Acceptance orientation may be challenged as well to make ethical or moral decisions across cultural groups. While a person within Acceptance embraces a deeper understanding of cultural differences, this can lead to the individual struggling with reconciling behavior in another cultural group that the person considers unethical or immoral from his or her own cultural viewpoint. When Acceptance is present in organizations and educational institutions, diversity feels “understood.”

The intercultural competence development strategy for Acceptance is to help individuals or groups interact across cultures in ways that expand their knowledge about cultural differences, including culture-general and culture-specific frameworks, and to gain skills in adapting to these differences. They can also confront cross-cultural ethical questions within their specific workplace or living situation by fully considering what a particular practice means from their own cultural perspective and what a cultural practice represents in a different cultural community.

**Adaptation**

An Adaptation orientation consists of both Cognitive Frame-Shifting (shifting one’s cultural perspective) and Behavioral Code-Shifting (changing behavior in authentic and culturally appropriate ways). Adaptation enables deep cultural bridging across diverse communities using an increased repertoire of cultural frameworks and practices in navigating cultural commonalities and differences. An Adaptation mindset sees adaptation in performance (behavior). While people with an Adaptation mindset typically focus on learning adaptive strategies, problems can arise when people with Adaptation mindsets express little tolerance toward people who engage diversity from other developmental orientations. This can result in people with Adaptive capabilities being marginalized in their workplace. When an Adaptation mindset is present in the workplace, diversity feels “valued and involved.”

The intercultural competence development strategy for Adaptation is to continue to build on one’s knowledge of cultural differences and to further develop skills for adapting to these differences, including engaging in “cultural mediation” between cultural groups that are experiencing problems.

**Cultural Disengagement**

Cultural Disengagement is not an orientation on the Intercultural Competence Continuum. It involves the degree of connection or disconnection an individual or group experiences toward a primary cultural community.
The Intercultural Development Continuum (IDC): Perceptions & Behaviors

Mitchell R. Hammer, Ph.D.

The Intercultural Development Continuum (IDC): Perceptions & Behaviors (IDI Handout)
Mitchell R. Hammer, Ph.D.


<table>
<thead>
<tr>
<th>IDC orientation</th>
<th>Core characteristics</th>
<th>What person may think/feel/do</th>
<th>Developmental task</th>
<th>Organizational implications</th>
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| Denial: Little recognition of more complex cultural differences | Disinterest in and/or avoidance of cultural difference | Cognition:  
- Difficulty in seeing communication and behavior as “cultural”  
- May not see value in “knowing more about cultural differences” | Recognition of non-threatening, cultural differences | Denial organization is Assimilationist:  
Generally unaware about cultural issues  
Susceptible to being blindsided by race, gender, cultural issues  
Climate of inattentiveness for cultural differences |
| | Insular around cultural differences, e.g., “why learn more about cultural differences” | Affect:  
- May express naïve attitude towards diversity  
- May feel uncomfortable or fearful in culturally different settings | | |
| | Assumes commonalities with less focus on differences | Behavior:  
- Seek familiar patterns  
- Avoid the culturally different | | |
| | Key to understanding: Commitment to one’s own cultural values and practices | Exercise of Power:  
- May unintentionally yet ethnocentrically interact with others who are culturally different | | |


### IDC orientation | Core characteristics | What person may think/feel/do | Developmental task | Organizational implications
---|---|---|---|---
**Polarization:** Judgmental orientation; “us & them” | An overly critical orientation toward cultural commonalities and differences | Cognition:  - Information categorized into evaluative categories—neutral statements of cultural difference rare | Reduce Polarization, equalize criticism, and find common humanity | Polarization organization is Assimilationist:  - Sense of superiority may lead to overconfidence or arrogance (“we know best”)  - Diversity recruitment, retention efforts are half-hearted & often unsuccessful  - Evaluative stance can damage domestic & international partnerships
 **Defense:** Uncritical toward own cultural practices; overly critical toward other cultural practices | Cultural difference seen as an obstacle  - Feeling “under siege” from other cultures  - May exhibit a sense “superiority” toward other cultural practices  - Overemphasizes (largely negative) differences toward other cultures and underemphasizes commonalities  - Key to understanding Defense: Ability to deal directly with difficulties around cultural differences | Affect:  - For Defense: The familiar is positive & the unfamiliar is negative  - For Reversal: The culturally unfamiliar is positive & the culturally familiar (own culture) is negative  - For Defense: Support of own group or of own privilege  - For Reversal: Support of other cultural practices |  |
 **Reversal:** Overly critical toward own cultural practices; uncritical toward other group cultural practices | Us vs. them where “they are good guys and we are the bad guys”  - May take on the “cause” of the oppressed group; other cultural practices given special privilege  - Overemphasizes (largely positive) differences toward other cultures and underemphasizes commonalities  - Diversity seen as solution to ethnocentrism of own culture group only  - Key to understanding Reversal: Positive evaluation of other cultures and a willingness to be self-critical | Behavior:  - For Defense: Intentional avoidance of the culturally different  - For Reversal: Intentional avoidance of own culture group members |  |
Exercise of Power:  - For Defense: May evaluate own cultural practices in ways that exclude equal opportunity for others  - For Reversal: May judge other cultural approaches in ways that discriminate against own cultural members |  |
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| **Minimization:** Highlights cultural commonality that can mask deeper recognition of cultural differences | Early Minimization may assume commonalities and not fully recognize cultural difference when present | Cognition:  
- Cultural differences perceived in neutral terms—but differences are made sense of and responded to within one’s own culturally familiar categories  
- Bow, shake, kiss—“it’s all just showing respect” | Increase cultural self-understanding and increase focus on understanding cultural differences | Minimization: Organization is Universalistic:  
- Overestimate cross-cultural competence to global & domestic diversity issues  
- Tolerance and “color-blind” policies may lead to poor recruitment & retention of diverse resources  
- Over-emphasis on corporate culture creates strong pressure to conform  
- Lacks deeper appreciation of diversity as a resource |
|                    | Middle/late Minimization may accurately recognize cultural commonalities and differences but may not fully attend to the differences | Affect:  
- Expresses positive (i.e., nice) behavior in one’s own cultural form or terms |  |  |
|                    | Overestimates own competence around cultural differences and diversity issues, views tolerance as sufficient | Behavior:  
- Actively supports more universalistic principles, values & practices without full understanding of how those principles, values, & practices may mean something different in other cultures |  |  |
|                    | Overemphasizes commonalities and underemphasizes differences | Exercise of Power (dominant culture form):  
- Accept with little discomfort institutional privilege  
- Tends to disavow power yet unconsciously impose own cultural norms |  |  |
<p>|                    | If from a dominant culture group, may lack deeper cultural “self-awareness” |  |  |  |
|                    | If from a non-dominant group, may use Minimization more as a “strategy” to accommodate to the dominant cultural values &amp; practices |  |  |  |
|                    | Key to understanding: Recognizes cultural commonalities across differences and tries to behave in tolerant ways |  |  |  |</p>
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| **Acceptance:** Recognizes cultural commonality & difference in own & other cultures | Curious and interested in cultural differences | Cognition:  
- Recognizes culturally different ways of make sense of & responding to cultural differences & similarities  
- Uses culture-general frameworks that allow systematic understanding of contrasts of values & behavior between cultures  
- Culture-specific frameworks allow understanding of values & behavior within specific cultural communities | Increase cultural self-understanding, understanding cultural differences, and engaging in culturally adaptive behavior | Acceptance  
Organization is Bridging:  
Active efforts to recruit & retain diverse workforce  
Able to talk the talk but not walk the walk consistently  
Recognizes the local cultural context as different from one’s own—but difficulty in taking appropriate action  
Managers are encouraged to value cultural diversity by not trained in intercultural skills |
| | Committed to cultural diversity agenda (talk the talk) but not sure how to “walk the walk” |  
Affects relevancy of cultural context but unclear how to appropriately adapt to cultural difference  
Key to understanding: *Values both cultural commonalities and differences & see’s how cultural differences are relevant* | | |
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<td><strong>Adaptation:</strong></td>
<td>Increased repertoire of cultural frameworks and behaviors available to effectively bridge cultural commonalities and differences</td>
<td>Cognition:</td>
<td>Attaining bi-cultural and/or multi-cultural adaptation</td>
<td>Adaptation organization is Bridging:</td>
</tr>
<tr>
<td>Able to shift cultural perspective &amp; adapt behavior to cultural context</td>
<td>Individuals define their role as demanding intercultural competence (performance in adaptation)</td>
<td>– Conscious reframing of cultural information &amp; observations in various ways</td>
<td></td>
<td>Organization encourages development of intercultural competence among all staff</td>
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<td>Key to understanding: Generally flexible in cultural perspective, deep understanding of at least one other culture, comfortable bridging across culture communities</td>
<td>– Able to make sense of cultural differences in ways similar to people from another cultural group</td>
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<td>Domestic and international cultural differences used as a resource for multicultural teams and the organization as a whole</td>
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<td><strong>Affect:</strong></td>
<td></td>
<td>Strong climate of respect for diversity</td>
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<td>– Intentional interest, mindfulness around cultural issues</td>
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<td>– High value &amp; commitment to intercultural competence for self and others</td>
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<td><strong>Behavior:</strong></td>
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<td>– Intentional perspective-taking of alternative cultural views</td>
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<td>– Actively attempts to increase repertoire of cultural behavior</td>
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<td><strong>Exercise of Power:</strong></td>
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<td>– Ability to recognize &amp; respond to power within a cultural context</td>
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<td>– Some ability to exercise power in culturally appropriate ways</td>
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| Cultural Disengagement  
Sense of disconnection from a primary cultural community | A feeling of being an “outsider” in your own group  
May feel comfortable with a “contrarian” stance  
May have difficulty participating in important symbols, events and activities shared in one’s community  
May be related to experiences of feeling rejected in your own group  
May be related to experiences where one feels “between two or more” cultural communities | Cognition:  
- Sense of intellectual distance from those pursuits most important to culture group members  
Affect:  
- Feeling of emotional disconnection or felt disinterest in the daily life of culture group members  
Behavior:  
- Unwilling to fully participate in key activities of the culture—even when lack of participation may frustrate culture group members  
Exercise of Power:  
- Not applicable as Cultural Disengagement is not an intercultural competence orientation on the Developmental Continuum | Cultural disengagement is not incorporated in the Developmental Continuum  
Should ask if person is willing to discuss this if profile indicates “not fully resolved” in this dimension  
Discussion can focus on the ways the individual or group’s sense of disconnection from a community manifests itself | Individual may be seen by members of his/her own cultural community within an organization as not committed or not a good “team player”  
Relationships with members from one’s own cultural community may be more distant |

IDI Guided Development: Best Practices
IDI Guided Development® (IDI Handout)
Mitchell R. Hammer, Ph.D.

There are many assessment tools that claim to measure intercultural competence, global effectiveness, cross-cultural adaptation—and even cultural intelligence. These instruments are not grounded in a comprehensive, cross-culturally validated theory of intercultural competence. Rather, these assessment tools measure individual, discrete concepts (e.g., emotional intelligence, open-mindedness) that are found in research to be weakly related—if at all—to critical outcomes of intercultural contact, such as goal accomplishment in cultural diverse settings. Further, these instruments provide little guidance on how individuals, teams and organizations can actually increase intercultural competence in ways that demonstrate bottom-line results in achieving educational and organizational goals.

In contrast, the Intercultural Development Inventory® or IDI® is a cross-culturally valid, reliable and generalizable measure of intercultural competence along the validated intercultural development continuum that is adapted, based on IDI research, from the DMI theory developed by Milton Bennett. Further, the IDI has been demonstrated through research to have high predictive validity to both bottom-line cross-cultural outcomes in organizations and intercultural goal accomplishments in education.¹

The IDI is more than a measurement tool. It also provides guidelines on the kinds of learning interventions that most effectively and efficiently build intercultural competence. Further, there is a growing body of research that clearly demonstrates that with appropriate learning interventions based on IDI profile results, individuals and groups can greatly increase their intercultural competence and also implement that increased cross-cultural capability in ways that accomplish key educational and organizational goals.

The use of the IDI to help IDI Qualified Administrators build intercultural competence in their educational institutions and organizations is what I have termed, “IDI Guided Development®”. What is IDI Guided Development?

IDI Guided Development® is an innovative, comprehensive, assessment driven approach to building intercultural competence targeted to accomplish intercultural goals through the use of the Intercultural Development Inventory.

IDI Guided Development is a systematic process for using the IDI profile results to select individual coaching strategies for individuals, to identify training activities to building intercultural competence for groups, and to more effectively develop diversity and inclusion solutions that span the domestic arena to the global environment.

IDI Guided Development links IDI profile results to the goals and challenges individuals and groups face in navigating cultural differences—insuring that learning interventions go beyond “awareness building” to direct impact on critical needs and concerns.


5-Steps for Administering the IDI and Enhancing IDI Guided Development®
Mitchell R. Hammer, Ph.D.

IDI Guided Development fundamentally involves five core steps, whether your developmental focus is on the individual, the group or on baseline (benchmarking) levels. These five common steps are:

**Step 1: Meet with Stakeholders**

You may be tasked in your organization to initiate an intercultural competence effort or you may be an outside consultant wanting to use the IDI with a client. Regardless, your first step is establish the scope of your IDI project. This typically involves “making the case” to your stakeholders about why intercultural competence development is important to the organization and why the IDI is the best solution to build intercultural skills. The “IDI Client Interview Guide” lists key questions important to discuss with stakeholders in order to best “make the case”. In addition, you can also work with your stakeholders to identify the specific IDI applications you will pursue. These include:

- **Individual intercultural competence development.** This involves administering the IDI to an identified set of individuals (e.g., executive leaders) and providing each leader with his/her own individual IDI profile feedback and their customized, Intercultural Development Plan (IDP).

- **Group or team intercultural competence development.** This involves administering the IDI to one or more identified groups (e.g., departments) and providing all the group members with feedback on their group IDI profile results.

- **Baseline assessments for organizational development.** This involves administering the IDI to all of the members of the organization (or a sample of members) in order to benchmark the levels of intercultural competence that exists organization-wide as well as within specific units or departments within the organization. Included as a baseline assessment is program evaluation, where the IDI is used as a pretest and then a posttest and perhaps a post-posttest to assess the impact of a specific program or intervention in building intercultural competence.
Step 2: Administer the IDI

In preparing your IDI on the IDI, LLC analysis site, you should make sure you keep the Contexting Questions (unless you have a very compelling reason not to), review the applicability of the demographic questions (for example, are you comfortable with the gender question responses as male/female or do you want to drop this question and replace it with a Customized Question with more elaborated response categories?), and add (up to six) Customized Questions you wish to include in the assessment. Once your IDI is setup, you then administer the IDI to the identified respondents. After they complete the IDI, IDI individual profile reports, Group Profile reports, and Intercultural Development Plans are automatically prepared on the v3 site for your use.

Conduct focus group interviews. When using the IDI for group development, you should conduct one or more focus group interviews with selected members of the group right after they complete the IDI. We recommend you use the IDI, LLC Focus Group Interview Guide. This Guide gives you a structure to engage focus group participants in sharing their cross-cultural goals and challenges.

The purpose of the focus group is to allow you to gather important information related to the cross-cultural goals and challenges the group collectively faces in navigating cultural differences and commonalities. Gathering this information right after the participants complete their IDI allows you ample time to summarize the key intercultural goals of the goals and the challenges they face when they engage cultural differences. This information is then used later when you present the group their group IDI profile results. You are able to relate the group's primary orientation and any trailing orientations to the cross-cultural challenges they face and the goals they have. This allows your group IDI profile feedback session to “connect” to the experience (goals, challenges) of the group directly.

Step 3: Prepare Respondents for IDI Profile Engagement

Does the individual or group have a reasonable understanding of the concepts of culture, cultural difference, diversity, inclusion, privilege, etc?

Review core concepts of intercultural competence. If the individual or group is not familiar with key concepts of intercultural competence, a review of these important ideas should be done (30 minutes to one hour). It would be important to present information on such topics as: (1) diversity, inclusion and intercultural competence, (2) what is culture and the difference between objective vs. subjective cultural patterns, (3) the role of power and privilege within dominant and non-dominant group relations, (4) the difference between culture-general and culture-specific patterns of differences, (5) the difference between a stereotype and a cultural generalization, and (6) the idea that not all individuals who are a member of a cultural group necessarily share the same cultural patterns. For information on these concepts, see: Bennett, M.J., 1998, Intercultural Communication: A current perspective (chapter 1, 1-34), in M.J. Bennett (Ed.), Basic Concepts, Yarmouth, ME: Intercultural Press.

We highly recommend you show or have individuals and groups view the following powerpoint presentation prepared by IDI, LLC. This presentation provides an engaging review of key concepts related to intercultural competence:

- IDI, LLC, “Core Concepts of Intercultural Competence,” 2012, powerpoint presentation, available to IDI Qualified Administrators and others through IDI, LLC.
Conduct an Intercultural Activity. If you are using the IDI for group development, it is oftentimes useful to have the group participate in a training activity that allows participants to engage patterns of cultural difference in a supportive manner. While this is not a requirement, this can provide a valuable experiential" learning process for each individual upon which they can reflect in Step 4 below how their individual or group IDI profile is reflective of how they made sense of the activity and how they responded during the training program. This can be done as part of an individual IDI profile feedback session or part of an IDI group profile feedback program.

One activity we recommend using is the Intercultural Conflict Style Inventory (ICSI). The ICSI can be used in as little as 1.5 hours or for a whole day of intercultural training. As an IDI Qualified Administrator, you are now introduced to this valuable tool during the Qualifying Seminar and are therefore certified to order and use the ICSI in your own training. The ICSI is also useful to use as part of a training intervention following the action-planning step 5 described below.

Review the Intercultural Development Continuum. Once the group has a basic understanding of key concepts related to intercultural competence, they then need to review the Intercultural Development Continuum (30 minutes to one hour). Before presenting an individual or a group their IDI profile, it is critical to have the respondents gain familiarity with the Intercultural Development Continuum (IDC). This can be done as part of an individual feedback session or a group IDI profile feedback session.

The recommended, and most efficient way to introduce the IDC to an individual or a group (prior to reviewing their IDI profile results) is to have them view the 27-minute IDI Training Video:

- “Practical Applications of the Intercultural Development Inventory.” This video is available online to you as an IDI Qualified Administrator to show to IDI respondents and also have individuals view this video program on their own, for example, prior to a group training or individual IDI profile feedback session, thus saving valuable time. This program engagingly explains the Intercultural Development Continuum and describes, with compelling personal examples, how individuals respond to cultural differences based on their developmental orientation (downloading the IDI training video is not permitted).

Step 4: Review the IDI Profile Results (with an individual or with a group)

For an individual IDI respondent, you now review his/her own IDI profile results. Following this in-person or virtual session, you provide the individual with his/her own customized, Intercultural Development Plan (IDP). The IDP provides a person with a detailed blueprint for building his/her own intercultural competence.

For a group, you review their IDI profile with the group and related their profile results to the summary you prepared earlier of the group’s cross-cultural goals and challenges. Following this, you engage the group (at the end of the in-person or virtual presentation) in action planning.

Step 5: Engage in IDI Guided Development® based on IDI Profile Results

Once the individual and/or the group’s IDI profile is reviewed, the next step is to develop specific learning interventions that increase intercultural competence in ways that directly translate into the achievement of individual and organizations’ goals.
When initiating conversation with an organization’s stakeholder(s) about building intercultural competence through the use of the Intercultural Development Inventory® or IDI®, the questions below can be posed to the stakeholder(s) so that you, as the IDI Qualified Administrator (QA) can gain greater understanding of the perspective the stakeholder(s) has concerning the intercultural competence effort.

1. What is the motivation for (group x) for participating in this IDI effort?
2. What are primary goals of (group x)—what do you hope to achieve?
3. What are the challenges (group x) faces where successfully navigating cultural differences is important?
4. What are some common situations that participants may recall where cultural differences were challenging to the group?
5. What do the participants need from this program to be able to say, “this was very successful, thanks for doing it”?
6. What landmines exist with this group that I should be aware of?
7. What has happened with previous diversity/inclusion efforts with the group? Were they successful/unsuccesful? Why or why not?
8. What do I need to know that I have not asked about?
IDI Focus Group Interview Guide (IDI Handout)

When using the Intercultural Development Inventory® (IDI®) to assess a group or team’s intercultural competence, it is essential that you as the IDI Qualified Administrator (QA) conduct one or more focus group interviews with selected participants from the identified group. These focus group interviews provide you with valuable information regarding the group’s cross-cultural goals and the kinds of challenges the group faces in successfully navigating cultural differences and commonalities. This information is used when you give the group feedback on their group IDI profile, allowing you to relate the profile results to their experience—to their cross-cultural goals and challenges.

*If interviewee asks for a definition of cultural diversity, response is to suggest it means, “people from, for example, different races, ethnicities, gender, national origin, sexual orientation, and ability/disability”

Core Questions

1. What is your name, position (title), major responsibilities in organization, number of years with (organization), cultural background, and familiarity with different cultural communities?

2. What challenges does your team face in working effectively with people from culturally diverse groups?

3. What challenges do people from culturally diverse groups face in working effectively with your team?

4. What are key goals your team has where cultural differences need to be successfully navigated?

5. Think of some workplace situations that you were personally involved with or observed where cultural differences needed to be addressed and:
   a. The situation ended negatively – that is, was not successfully resolved. Please describe where and when the situation took place, who was involved (please do not use actual names), what happened and the final results.
   b. The situation ended positively – that is, was successfully resolved. Please describe where and when the situation took place, who was involved (please do not use actual names), what happened, and the final results.

6. What can your team do differently to improve its results related to cultural diversity and inclusion?

7. What would be a successful outcome of this IDI Guided Development effort?

Closing Question

8. Is there anything else you would like to comment on that we have not discussed?

IDI Contexting Questions (IDI Handout)

The questions below are the IDI® Contexting Questions that are included in each IDI that respondents complete. These questions are the basis for applying individual IDI profile results to a person’s experience and therefore, should not be removed from your IDI setup on the v3 analysis system.

Please respond to each of the questions below fully and completely. Please be assured your responses will be kept confidential.

1. What is your background (e.g., nationality, ethnicity) around cultural differences?

2. What is most challenging for you in working with people from other cultures (e.g., nationality, ethnicity)?

3. What are key goals, responsibilities or tasks you and/or your team have, if any, in which cultural differences need to be successfully navigated?

4. Please give examples of situations you were personally involved with or observed where cultural differences needed to be addressed within your organization, and:
   - The situation ended negatively—that is, was not successfully resolved. Please describe where and when the situation took place, who was involved (please do not use actual names), what happened and the final result.

   - The situation ended positively—that is, was successfully resolved. Please describe where and when the situation took place, who was involved (please do not use actual names), what happened and the final result.
[NOTE: When setting up the IDI the QA’s have the opportunity to select whether they want to include the Program Evaluation question # 5 below. Question # 5 below is part of the Contexting Questions. Program Evaluation question # 5 is typically selected by QA’s to include when respondents have completed a program and the QA wants this more qualitative information on how effective the program was for the respondent. This question might be included in the IDI Contexting Questions, for example, in a post-test.]

When selecting to use the Program Evaluation in the IDI Set Up please fill in the name of the program and brief description of the program, this will help the respondents answer accurately to the specific program.

Program Evaluation Questions

5. Please respond to this question only if: you have participated in a specific cultural or diversity program in your organization in which your views about the impact of this program are requested.

- Please state the name of this program and write a brief description of your participation:

- Did you and/or your team achieve specific outcomes or goal accomplishments that were influenced by or resulted from your participation in this program? If so, please describe.

- Did you and/or your team achieve other (e.g., unplanned, unintended) outcomes that were influenced by or resulted from your participation in this program? If so, please describe.
IDI Individual Profiles & Intercultural Development Plans (IDP’s)
The IDI® can be effectively used with individuals to develop their intercultural competence. This also can be done in conjunction with work you may be doing using the IDI with a team or a group in your workplace. Below is a common approach for using the IDI with individuals.

**Phase 1: Confirm IDI Project**
- Meet with stakeholders
- Finalize individual use of the IDI
- Determine confidentiality
- Confirm follow-up coaching

**Phase 2: Administer IDI**
- Develop IDI customized questions
- Do NOT remove contexting questions

**Phase 3: Prepare individual for IDI profile feedback**
- Need to present core concepts of intercultural competence?—use IDI, LLC powerpoint presentation
- Review IDC: Use IDI training video, "Practical Applications of the IDI"

**Phase 4: Conduct individual IDI profile feedback**
- Follow 8-step individual IDI feedback template

**Phase 5: Conduct follow-up coaching (optional)**
Structuring your IDI Individual Feedback Session

Part 1: Purpose (15 minutes)
- Greeting & rapport building
- Refer to earlier interviews or group profile
- Review purpose & confidentiality

Part 2: Contexting Answers (15 minutes)
- Identify client goals
- Client elaborates on contexting question answers

Part 3: Profile (15 minutes)
- Review profile--"IDI indicates . . ."
- Apply profile to client’s experience--goals & challenges
- Confirm IDI results, "That's what the IDI indicates"

Part 4: IDP (15 minutes)
- Review with client their Intercultural Development Plan (IDP)
- Action planning
## Giving Individual IDI Profile Feedback: Mitchell R. Hammer, Ph.D.

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<th>Step</th>
<th>What client is thinking/feeling</th>
<th>What you can say or do</th>
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<td><strong>Step 1: Greeting, Purpose &amp; Confidentiality</strong>&lt;br&gt;• To introduce yourself.&lt;br&gt;• To review the purpose of the feedback session.&lt;br&gt;• To clarify the confidentiality of the session and the client’s individual IDI profile report.&lt;br&gt;• To assure clients that this feedback session is designed to help them better bridge across cultural differences.</td>
<td>Clients may be unsure what to expect from feedback session.&lt;br&gt;Clients may be nervous, anxious about their profile results.&lt;br&gt;Clients may be unclear who else will be able to view their profile.</td>
<td>Hello, my name is . . . .&lt;br&gt;The reason I am talking with you today is that this feedback session is part of a program your organization has . . . .&lt;br&gt;This session and your individual IDI profile report is confidential. This means . . . .&lt;br&gt;In reviewing your IDI profile, let’s focus on how this can help you bridge across cultural differences and commonalities.</td>
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<td><strong>Step 2: Confirm Clients Intercultural Goal</strong>&lt;br&gt;• Confirm with clients their goal or reason for participating in the IDI feedback session&lt;br&gt;• To anchor the feedback session in something client’s feel is important to achieve for building their intercultural competence.</td>
<td>Clients may be unsure about “what’s in it for me” by participating in the feedback session.&lt;br&gt;Clients may not clearly know how they can apply the insights from the feedback session to specific work or personal goals or challenges.</td>
<td>I notice you said in your answers to the contexting questions that it is important for you to [e.g., improve marketing in other countries].&lt;br&gt;In what ways might increasing your intercultural competence be helpful to you?&lt;br&gt;Let's review your IDI results in terms of helping you to . . . [restate client goal]</td>
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<td><strong>Step 3: Review Contexting Questions</strong>&lt;br&gt;• To have clients discuss in greater detail answers to the contexting questions&lt;br&gt;• To focus on those answers that QA thinks may be indicative of:&lt;br&gt;  • Developmental Orientation&lt;br&gt;  • Trailing Orientation(s)</td>
<td>Clients wants QA to understand their experiences around cultural differences&lt;br&gt;Clients wish to feel supported talking about their cross-cultural experiences</td>
<td>Could you tell me about [refer briefly to clients answers to contexting questions]&lt;br&gt;Could you say more about . . . [refer to contexting questions answers]&lt;br&gt;What was that like for you when you . . . &lt;br&gt;What did you finding challenging in understanding or responding in [refer to example or situation in contexting question answers] . . .&lt;br&gt;Note: if client did not complete the contexting questions, ask each question in turn.</td>
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### Giving Individual IDI Profile Feedback: Mitchell R. Hammer, Ph.D.

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<th>Step</th>
<th>What client is thinking/feeling</th>
<th>What you can say or do</th>
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</table>
| **Step 4: Review PO, DO and Orientation Gap**  
  • To briefly explain what the Perceived and Developmental scores mean and the significance of the Orientation Gap score. | • Client unsure the meaning of the PO, DO and orientation gap scores in his/her IDI profile. | • *I would like to first focus on your Orientation Gap—whether you over or underestimate how culturally adaptable you are.*  
  • Let's start with your Perceived Orientation—how you see yourself in terms of your intercultural competence—this is within [specify orientation]. This indicates you see yourself as [describe orientation].  
  • Your Developmental Orientation—or how you primarily deal with cultural differences is within . . . [briefly describe].  
  • This gap between your Perceived and Developmental Orientations indicates that you . . . (overestimate/underestimate/estimate/accurately) how adaptable you are to cultural differences.  
    • [Note: if overestimation, you might say ,] this gap indicates you likely feel you are more adaptable across cultural differences than people from other cultural groups may see you  
    • [If underestimation]. This gaps indicates you see yourself as less culturally adaptable than people from other cultures likely think you are  
    • [If accurate:] This gap indicates you are accurate insofar as the way you see yourself dealing with cultural differences & commonalities matches how people from different cultures likely see your capability.  
  • It is important to keep the Orientation Gap in mind as we focus later on what kinds of strategies you can use to increase your intercultural competence along the continuum. |
| **Step 5: Connect Developmental Orientation to clients experience**  
  • To focus on how clients Developmental orientation is reflected in their experience—how they deal with cultural differences & commonalities | • Clients may not clearly see how they make sense of and respond to cultural differences & commonalities from their primary orientation | • *Now let’s look again in more detail your Developmental Orientation.*  
  • I notice that when you talked about ”x” earlier with me, you said, ”y” [refer back to contexting question answers that fit DO].  
  • You also mentioned “x” in terms of another challenge you face. The way you made sense of and/or responded to cultural differences reflects a more ”y” orientation [state DO].  
  • [Have clients reflect on connection between DO and the ways they deal with cultural differences.]  
  • [when client connects/confirms their DO in their experience, say:] That’s exactly what is reflected here with your Developmental Orientation. |
### Giving Individual IDI Profile Feedback: Mitchell R. Hammer, Ph.D.

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<th>Step</th>
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<tbody>
<tr>
<td><strong>Step 6: Connect Trailing Orientation(s) to clients experience</strong>&lt;br&gt;• To focus on how the Trailing Orientation (TO) is reflected in the clients experience—how they deal with cultural differences &amp; commonalities</td>
<td>• Clients may not clearly see how they make sense of and respond to cultural differences &amp; commonalities from their Trailing Orientation(s)</td>
<td>• [if there are Trailing Orientations] Now let’s look at your Trailing Orientation. These are orientations earlier on the continuum that you use in some situations, some topics or perhaps when under stress. These earlier orientations hold you back from engaging cultural differences that you usually do from “x” [state clients’ DO]. Your Trailing Orientation(s) is “x” [state TO and briefly describe].&lt;br&gt;• I notice that when you talked about “x” earlier with me, you said, “y” [refer back to contexting question answers that fit TO].&lt;br&gt;• You also mentioned “x” in terms of another challenge you face. The way you made sense of and/or responded to cultural differences reflects a more “y” orientation [state TO].&lt;br&gt;• [Have clients reflect on connection between TO and the ways they deal with cultural differences.]&lt;br&gt;• [when clients connect/confirm their TO in their experience, say:] That’s exactly what is reflected here with your Trailing Orientation.</td>
</tr>
<tr>
<td><strong>Step 7: Connect Cultural Disengagement to clients experience</strong>&lt;br&gt;• To help clients see the relationship between being unresolved in Cultural Disengagement and how attached or disconnected they feel towards one or more primary cultural group.&lt;br&gt;• If Cultural Disengagement is not fully resolved, to ask clients whether they want to talk about this?</td>
<td>• Client may be unclear if they are not fully resolved in Cultural Disengagement how this impacts their commitment to particular cultural communities</td>
<td>• Cultural Disengagement refers to how connected or disconnected you feel you are to a primary cultural community.&lt;br&gt;• [If resolved, say:] This indicates you are resolved in terms of how connected you feel toward a primary cultural group.&lt;br&gt;• [If not fully resolved, say:] This indicates you are not fully resolved in terms of how connected or disconnected you feel toward a primary cultural community. Is this something you would like to talk about?</td>
</tr>
<tr>
<td><strong>Step 8: Introduce Intercultural Developmental Plan (IDP)</strong>&lt;br&gt;• To review whether QA will be providing additional coaching to the client using the IDP.&lt;br&gt;• To provide an initial overview to how clients can use the IDP to increase their own intercultural competence.</td>
<td>• Clients may be unsure what they can do to move along the Developmental Continuum in order to more effectively deal with cultural differences &amp; commonalities.</td>
<td>• [If QA is not conducting follow-up coaching, say:] Let’s take a look at your Intercultural Development Plan. This IDP is customized to your primary orientation. I would like to walk you through how you can use your IDP to increase your intercultural competence.&lt;br&gt;• [If QA is conducting follow-up coaching, say:] This Intercultural Development Plan is customized to your primary orientation. There are five steps in your IDP I would like to work with you on over the next “x” sessions. Let’s take a look at this first step and talk about what you can work on until we meet again.</td>
</tr>
</tbody>
</table>

Copyright, 2007, 2012 Mitchell R. Hammer, Ph.D.
The Individual Intercultural Development Plan® IDP

The individual Intercultural Development Plan (IDP) has been developed by Dr. Hammer in response to many requests for strategies and interventions to help individuals increase their intercultural competence. The IDP based on a person's own, unique IDI individual profile and provides customized personal action plans through a comprehensive 5-step developmental process.

The IDP is effective because of the self-reflective, intentional process focused on understanding patterns of difference and commonality between oneself (and one's cultural group) and other cultural group's perceptions, values, and practices.

Engaging in this self-reflective process for approximately 30-50 hours of concentrated effort can result in a gain of one full orientation (or more). It should take place over approximately 3 to 9 months with participation in coaching interaction ranging from weekly to one per month. These are not rigid timing recommendations but provide a guideline.

The IDP outlines 10 key intercultural learning opportunities. The learning activities that are most effective for an individual mostly identified by the participants themselves as each person may favor some learning activities over others. Some people, for instance, might favor emphasis on concepts or theories while others learn more effectively when they are able to experiment and “try something out”.

What individuals can expect to gain using the IDP

- Insights concerning intercultural challenges they face,
- Clarity of intercultural goals important to them,
- Targeted, developmental learning that increases intercultural competence in bridging across diverse communities.

The IDP outlines a 5-Step Process

Step 1 is a review of the individuals' IDI Profile Results. This takes the individual back to the IDI framework. Questions will support reflection on one’s own profile results.

Step 2 helps the individual describe his/her intercultural background in terms of IDI profile results. This supports increased cultural self-understanding.

Step 3 assists the analysis of developmental goals and progress indicators. This supports intentionality to achieve goals and observe progress.

Step 4 guides the individual in the identification of intercultural stress points that are barriers to goal attainment. This supports accountability for application of action to cultural stress points.

Step 5 identifies a specific set of learning activities as part of the individuals' Intercultural Development Plan. This supports initiation and engagement in intercultural competence development efforts.
Guidelines for Using the IDP

☑️ The IDP is customized for each individual by name and Developmental Orientation; it cannot be copied or re-used with individuals who do not have an IDI profile.

☑️ The IDP is used with the IDI profile that is customized for each person.

☑️ The IDP can only be used if the individual receives an IDI profile feedback session.

☑️ The IDP is most impactful when used as the foundation for individual coaching sessions by a QA following the profile feedback session.

☑️ The IDP must be given to each person after the QA completes their profile feedback; however, the person can work through the IDP on their own.

☑️ The IDP is not a separate IDI “product” that can be charged for.
IDI Group Profiles
5-Phase Approach for GROUP Development of Intercultural Competence

The IDI® can be effectively used with groups to develop their intercultural competence. This also can be done in conjunction with work you may be doing using the IDI with individuals in your workplace. There are two key features that differentiate the group IDI profile feedback session from the individual profile feedback session:

**Focus Group Interviews**

When providing a group with their group IDI profile results, it is critical to conduct one or more focus group interviews with some members of the group before the group feedback session. These focus group interviews help you identify key, shared cross-cultural goals of the group and specific challenges the group faces navigating cultural differences and commonalities.

This information is then used by the QA during the group IDI profile feedback session to help the group connect how their Developmental Orientation and any Trailing Orientations are used to make sense of cultural differences as described by the focus groups in terms of the group's goals and challenges.

**The Intercultural Conflict Style (ICS) Inventory Training**

We believe a group will generally gain deeper cultural self-understanding if they are given the Intercultural Conflict Style (ICS) Inventory training [the ICS Inventory, Participant Interpretive Guide, and Facilitators Resource Guide are developed by Mitchell Hammer, Ph.D. and available through IDI, LLC].

The ICS Inventory program gives participants an insightful way to identify their core (culturally learned) approach for dealing with disagreements and conflict and presents information on how people from different cultures resolve conflicts.

The ICS program can be done in as little as one hour or more, depending on the group’s time. The ICS Inventory acts as an excellent way to have the group members experience what cultural differences “look like” and gain increased self-understanding on how interculturally competent they are in navigating differences in intercultural conflict resolution approaches.

Below is a common approach for using the IDI with groups.
5-Phases for Building GROUP Intercultural Competence

Phase 1: Confirm IDI Project
- Meet with stakeholders
- Finalize group use of the IDI
- Determine confidentiality
- Confirm follow-up training

Phase 2: Administer IDI
- Develop IDI customized questions
- Do NOT remove contexting questions
- Conduct focus group interviews

Phase 3: Prepare group for IDI profile feedback
- Need to present core concepts of intercultural competence?—use IDI, LLC powerpoint presentation
- Review IDC: Use IDI training video, "Practical Applications of the IDI"

Phase 4: Conduct group IDI profile feedback
- Conduct Intercultural Conflict Style (ICS) Inventory training
- Follow 8-step group IDI feedback template

Phase 5: Conduct follow-up training (optional)
Structuring your IDI GROUP Feedback Session

Part 1: Purpose (20 minutes)
- Greeting & rapport building
- Refer to earlier focus group interviews
- Review purpose & confidentiality

Part 2: Focus Group Results (20 minutes)
- Review cross-cultural goals of group
- Review cross-cultural challenges group faces

Part 3: Profile (20 minutes)
- Review profile—"IDI indicates . . ."
- Apply profile to group’s experience—goals & challenges
- Confirm IDI results, "That’s what the IDI indicates"

Part 4: Action Planning (20 minutes)
- Engage in problem solving
- Help group identify next steps
- [optional]: Identify training design
### Giving Group IDI Profile Feedback: Mitchell R. Hammer, Ph.D.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Step 1: Greeting, Purpose &amp; Confidentiality</strong></td>
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<td></td>
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<tr>
<td>• To introduce yourself.</td>
<td>• Hello, my name is . . . .</td>
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<tr>
<td>• To review the purpose of the group profile feedback session.</td>
<td>• The reason I am talking with you today is that this feedback session is part of a program your organization has . . . .</td>
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<tr>
<td>• To clarify the confidentiality of the session and the group’s IDI profile report.</td>
<td>• This session and your group IDI profile report is confidential. This means . . . .</td>
<td></td>
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<tr>
<td>• To assure clients that this feedback session is designed to help them better bridge across cultural differences.</td>
<td>• In reviewing your IDI profile, let’s focus on how this can help you bridge across cultural differences and commonalities and how this information can be helpful in the tasks and decisions of this group.</td>
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<td></td>
<td>• What I would like to accomplish in our time together is to first, review the results from the focus group interview(s) I had with some you. Specifically, I will summarize what you told me were some goals you as a group have and the challenges you face in successfully navigating cultural differences. Second, I will review your Group IDI profile results, and finally, we will focus on some action planning.</td>
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<td><strong>Step 2: Confirm Group’s Intercultural Goal</strong></td>
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<tr>
<td>• Confirm with group their goal or reason for participating in the IDI feedback session by referring to result from focus group.</td>
<td>• When I met with some of you in the focus group, you identified the following main goals or reasons for building intercultural competence as a group, . . . .</td>
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<tr>
<td>• To anchor the feedback session in something the group feels is important to achieve for building their intercultural competence.</td>
<td>• Let’s review your IDI results in terms of helping you to . . . [restate group goal(s)]</td>
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<tr>
<td><strong>Step 3: Review Focus Group Results</strong></td>
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<tr>
<td>• To present the group with the challenges they face based on the focus group interviews.</td>
<td>• When I asked you in the focus group, “what challenges do you face navigating cultural differences”, you stated . . . .</td>
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<tr>
<td>• To focus on those challenges that QA thinks may be indicative of:</td>
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<tr>
<td>• Developmental Orientation</td>
<td>• I also asked the group what challenges diverse members of the organization face in working with you as a group. and you said, . . .</td>
<td></td>
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<tr>
<td>• Trailing Orientation(s)</td>
<td>• [Note: If you did not conduct focus group before the IDI group profile feedback session, then you need to ask the group about their goals &amp; challenges at the beginning of the session]</td>
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</table>

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### Giving Group IDI Profile Feedback: Mitchell R. Hammer, Ph.D.

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| **Step 4: Review PO, DO and Orientation Gap** | • Group may be unsure the meaning of the PO, DO and orientation gap scores in their group IDI profile. | • I would like to first focus on your Orientation Gap—whether you over or underestimate how culturally adaptable you are as a group.  
• Let’s start with your Perceived Orientation—how you see yourself in terms of your intercultural competence—this is within [specify orientation]. This indicates you see yourself as [describe orientation].  
• Your Developmental Orientation—or how you primarily deal with cultural differences is within . . . [briefly describe]  
• This gap between your Perceived and Developmental Orientations indicates that you . . . (overestimate/underestimate/estimate/accurately) how adaptable you are to cultural differences.  
  • [Note: if overestimation, you might say,] this gap indicates you as a group likely feel you are more adaptable across cultural differences than people from other cultural groups may see you  
  • [If underestimation]: This gap indicates you see yourself as less culturally adaptable than people from other cultures likely think you are  
  • [If accurate:] This gap indicates you are accurate insofar as the way you see yourself dealing with cultural differences & commonalities matches how people from different cultures likely see your capability.  
• It is important to keep the Orientation Gap in mind as we focus later on what kinds of strategies you can use to increase your intercultural competence along the continuum. |
| **Step 5: Connect Developmental Orientation to Group’s Goals & Challenges** | • Group may not clearly see how they make sense of and respond to cultural differences & commonalities from their primary orientation | • Now let’s look again in more detail your Developmental Orientation.  
• Your focus group mentioned “x” as a challenge your group faces. Your primary orientation [state DO] indicates that you likely struggle to deal with “x” by . . . [point out struggle of DO with the way group described their cross-cultural challenge]  
• You also mentioned “y” in terms of another challenge you face. The way you made sense of and/or responded to cultural differences reflects . . . [state DO] [point out how DO struggles with “y” as a group] a more “y” orientation [state DO].  
• [when group connects/confirm their DO in their experience, say:] That’s exactly what is reflected here with your Developmental Orientation. |
## Giving Group IDI Profile Feedback: Mitchell R. Hammer, Ph.D.

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<tbody>
<tr>
<td><strong>Step 6: Connect Trailing Orientation(s) to Group’s Goals &amp; Challenges</strong>&lt;br&gt;• To focus on how the Trailing Orientation (TO) is reflected in how the group deals with cultural differences &amp; commonalities&lt;br&gt;• Group may not clearly see how they make sense of and respond to cultural differences &amp; commonalities from their Trailing Orientation(s)</td>
<td>• [if there are Trailing Orientations] Now let’s look at your Trailing Orientation. These are orientations earlier on the continuum that you use in some situations, some topics or perhaps when under stress. These earlier orientations hold you back from engaging cultural differences from your [state DO], the way you usually deal with differences.&lt;br&gt;• Your Trailing Orientation(s) is [state TO and briefly describe].&lt;br&gt;• When your focus group mentioned that one cross-cultural challenge you face is [state challenge from focus group results]. I am wondering if the struggle you experience in this situation might reflect [state TO]?&lt;br&gt;• [Have group reflect on connection between TO and the ways they deal with cultural differences.&lt;br&gt;• [when group connects/confirm their TO in their experience, say:] That’s exactly what is reflected here with your Trailing Orientation.</td>
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<tr>
<td><strong>Step 7: Briefly Note Cultural Disengagement Result</strong>&lt;br&gt;• To briefly summarize Cultural Disengagement result for the group—and to inform group that the Cultural Disengagement is not relevant for a group profile, but is when reviewing individual IDI profiles.&lt;br&gt;• Group may be unclear if they are not fully resolved in Cultural Disengagement &amp; unsure how relevant this is to the mission of the group</td>
<td>• Cultural Disengagement refers to how connected or disconnected you feel you are as a group to a primary cultural community.&lt;br&gt;• [If resolved, say:] This indicates you as a group are largely resolved in how connected you feel toward a primary cultural group.&lt;br&gt;• [If not fully resolved, say:] This indicates you as a group are not fully resolved in how connected or disconnected you feel toward a primary cultural community.&lt;br&gt;• This information is useful to when giving individual profile feedback, but is not relevant to a group, so we won’t spend much time on this.&lt;br&gt;• [If group asks why, say, Cultural Disengagement is about how connected people feel towards a primary cultural community—but members of the group have different cultural communities]</td>
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<tr>
<td><strong>Step 8: Group Action Planning</strong>&lt;br&gt;• To facilitate group’s action planning based on IDI group profile results&lt;br&gt;• Group may be unsure what they can do to move along the Developmental Continuum in order to more effectively deal with cultural differences &amp; commonalities.</td>
<td>• Let’s focus now on some action planning...&lt;br&gt;• [If QA is not conducting follow-up training, say:] Let’s talk about some options available for you to increase your intercultural competence based on your group profile results.&lt;br&gt;• [If QA is conducting follow-up training, say:] We will be designing training for your group based on your goals, challenges and your group profile results. This training will focus on helping you as a group better navigate cultural differences in order to accomplish objectives &amp; solve problems important to you.</td>
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Cross-cultural Validity of the IDI
The Cross-cultural Validity of the IDI

Evidence of the cross-cultural validity and practical impact of the Intercultural Development Inventory® (IDI®) is found in the remarkably strong support given from a wide-range of external, third-party, prestigious associations, journals/books and cross-cultural, professional organizations. Here are some endorsements that are particularly compelling:

- The American Council of Education (ACE) is the most visible and influential association of higher education in the United States. ACE represents presidents of 1800 colleges and universities. Ace brings together experts from all sectors in the country to address some of the most difficult challenges facing higher education. In 2003, ACE convened a working group on intercultural learning whose goal was to identify an assessment that provides direct evidence of student’s knowledge and skills that also addresses complex learning rather than more surface learning outcomes. In researching 20 assessment instruments, ACE concluded by recommending the IDI as one of only two tools that meets their rigorous review process.

- SIETAR Europa (Society for Education, Training and Research) in 2009, surveyed its membership to identify which cross-cultural assessment instruments are mostly widely accepted and used by cross-cultural professionals. The IDI was identified as the most widely used assessment tool used by professionals in the intercultural field.

- In 2012, M. Vande Berg, R.M. Paige, and K. Lou edited the influential book, Student learning abroad: What our students, what they’re not, and what we can do about it (Sterling, VA: Stylus). In this book, extensive research and specific case studies are presented that demonstrate student development of intercultural competence based on the use of the IDI. This book presents compelling evidence of the strong impact IDI guided development™ has in building students, mentor’s and faculty member’s intercultural competence.

- The International Journal of Intercultural Relations (IJIR) is the most important peer-reviewed academy publication within the broad, interdisciplinary field of intercultural relations. IJIR devoted a special issue to the Intercultural Development Inventory in 2003, attesting to the valuable contributions being made by the IDI in increasing intercultural competence.

- Over 66 Ph.D. dissertations have been completed using the IDI. This extensive use and acceptance of the IDI by Ph.D. faculty committees attest to wide-spread agreement concerning the cross-cultural validity of the IDI for use in Ph.D. level research.

- Two important reviews of the IDI along with other cross-cultural assessment instruments have been undertaken. Both reviews present favorable evidence regarding the rigorous cross-cultural validity, reliability and generalizability of the IDI. These reviews are:
The Cross-cultural Validity of the IDI (IDI Handout)
Mitchell R. Hammer, Ph.D.

The Intercultural Development Inventory® or IDI® is a widely-used assessment of intercultural competence, with over 60 published articles and chapters and over 42 Ph.D. dissertations.

The IDI has been rigorously tested and found to possess high cross-cultural validity and reliability. As a result, validity of the IDI is established not through “face” validity but rather, far more rigorous psychometric criteria. In other words, a person cannot “just look at the IDI items and determine what it measures or whether it is a valid assessment.”

In fact, a person’s subjective viewing of IDI items to determine whether the IDI “is a good measure of intercultural competence” is far less valid than reviewing the extensive social science validation protocols of the IDI. The result of these validation studies of the IDI provides objective confidence that:

- The IDI is a cross-culturally generalizable (i.e., international and domestic diverse culture groups), valid and reliable measure of intercultural competence that does not contain cultural bias.

The extensive psychometric validation protocols used in constructing the IDI are described in greater detail in two important, academic, “blind”, peer-reviewed publications. These two publications provide information regarding the multiple research studies that have been conducted specifically validating the IDI:


The chart below summarizes some of the main validation findings of the IDI.
Based on multiple studies, the IDI meets the following extensive psychometric criteria:

<table>
<thead>
<tr>
<th>Instrument Development Criteria</th>
<th>IDI Fully Meets Criteria</th>
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<tbody>
<tr>
<td>1. <em>Testing confirmed the underlying theoretical framework of the IDI</em>—the Intercultural Development Continuum or IDC (e.g., high inter-rater reliabilities based on in-depth interview analysis &amp; correlational analysis)</td>
<td>✔</td>
</tr>
<tr>
<td>2. <em>IDI items reflect perspectives of people from a wide range of international and domestic cultural groups</em> (e.g., through in-depth interviews)</td>
<td>✔</td>
</tr>
<tr>
<td>3. <em>IDI does not contain cultural bias</em> (e.g., initial pool of items generated from statements made by culturally diverse interviewees—not by the researchers)</td>
<td>✔</td>
</tr>
<tr>
<td>4. <em>IDI validity and reliability results confirmed in large, multicultural samples</em>—over 10,000 individuals (e.g., using rigorous Confirmatory Factor Analysis in item/scale analysis)</td>
<td>✔</td>
</tr>
<tr>
<td>5. <em>IDI has strong “content” validity</em> (e.g., initial item pool generated from actual statements made by interviewee’s from a wide-range of cultural groups &amp; Expert Panel Review used to narrow item pool—with high inter-rater reliabilities)</td>
<td>✔</td>
</tr>
<tr>
<td>6. <em>IDI has strong “construct” validity</em> (IDI Orientations correlated as predicted to Worldmindedness (cognitive measure) and Intercultural Anxiety (affective measure))</td>
<td>✔</td>
</tr>
<tr>
<td>7. <em>IDI has strong “predictive” validity in organizations</em> (e.g., IDI predictive of success in diversity recruitment and hiring)</td>
<td>✔</td>
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<tr>
<td>8. <em>IDI has strong “predictive” validity in education</em> (e.g., IDI predictive of achievement of study abroad outcomes)</td>
<td>✔</td>
</tr>
<tr>
<td>9. <em>IDI Developmental Orientation and Perceived Orientation scores are highly reliable</em> (.82, .83, coefficient alpha &amp; all sub-scales achieved satisfactory reliabilities)</td>
<td>✔</td>
</tr>
<tr>
<td>10. <em>Readability analysis of the IDI indicates the IDI is appropriate for individuals 15 years of age or higher</em></td>
<td>✔</td>
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</table>
IDI Normative Comparisons of Developmental and Perceived Scores

(IDI Handout)

Mitchell R. Hammer, Ph.D.

This chart permits comparison of IDI Developmental and Perceived Scores to a normative sample of respondents. This chart is useful in answering the question: “How do my IDI profile scores compare to others?” Here is an example. Let’s say that Bill got a developmental score of 95 and a perceived score of 130. This would put Bill at the 40th percentile for developmental score and the 90th percentile on perceived score. This means that 40% of the people (on our normative sample) had a developmental score lower than Bill and 90% of the norm sample had perceived score lower than Bill.

<table>
<thead>
<tr>
<th>Percentile of Individuals who score lower than:</th>
<th>Developmental Score N = 822</th>
<th>Perceived Score N=822</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>60.20</td>
<td>108.12</td>
</tr>
<tr>
<td>2</td>
<td>66.42</td>
<td>109.63</td>
</tr>
<tr>
<td>5</td>
<td>74.20</td>
<td>112.67</td>
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<tr>
<td>10</td>
<td>79.51</td>
<td>114.57</td>
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<tr>
<td>15</td>
<td>82.66</td>
<td>116.15</td>
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<tr>
<td>20</td>
<td>85.47</td>
<td>117.04</td>
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<tr>
<td>25</td>
<td>87.91</td>
<td>117.91</td>
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<td>30</td>
<td>90.81</td>
<td>118.58</td>
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<td>35</td>
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<td>119.64</td>
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<td>40</td>
<td>94.96</td>
<td>120.49</td>
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<tr>
<td>45</td>
<td>96.59</td>
<td>121.42</td>
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<td>50</td>
<td>99.14</td>
<td>122.18</td>
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<tr>
<td>55</td>
<td>101.12</td>
<td>122.86</td>
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<tr>
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<td>103.53</td>
<td>123.63</td>
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<tr>
<td>65</td>
<td>105.70</td>
<td>124.43</td>
</tr>
<tr>
<td>70</td>
<td>107.18</td>
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<td>125.92</td>
</tr>
<tr>
<td>80</td>
<td>111.86</td>
<td>126.86</td>
</tr>
<tr>
<td>85</td>
<td>114.03</td>
<td>128.17</td>
</tr>
<tr>
<td>90</td>
<td>116.85</td>
<td>129.56</td>
</tr>
<tr>
<td>95</td>
<td>121.79</td>
<td>131.41</td>
</tr>
<tr>
<td>99</td>
<td>123.11</td>
<td>135.85</td>
</tr>
</tbody>
</table>

Summary on the Validation Samples Used in Developing the IDI:
The 50-item Intercultural Development Inventory (IDI v2) was developed based on a cross-cultural sample of 591 respondents (see Hammer, M.R., Bennett, M.J. & Wiseman, R., 2003, The Intercultural Development Inventory: A measure of intercultural sensitivity. In M. Paige, Guest Editor, International Journal of Intercultural Relations, 27, 421-443). In 2009, a second (IDI v.3) cross-cultural sample of 4,763 respondents from a wide range of age groups and professions completed the IDI in their native language using rigorously back-translated versions of the IDI. In 2011, additional validity testing was completed with a cross-cultural sample of over 10,000 individuals (see Hammer, M.R., 2011, Additional cross-cultural validity testing of the Intercultural Development Inventory. International Journal of Intercultural Relations, 35, 472-487).

Standard Error of Measurement of the IDI
The Standard Error of Measurement (SEM) of a test refers to the standard deviation of test scores that would have been obtained from a single respondent had that respondent been tested multiple times. It is a measure of the "spread" of scores within a respondent had the respondent been tested repeatedly and ad infinitum. That is, if a single respondent were to take the same test repeatedly (with no new learning taking place between testing’s and no memory of question effects), the standard deviation of his/her repeated test scores is denoted as the Standard Error of Measurement. The SEM of the Developmental Orientation scale is 3.66 and 3.49 for the Perceived Orientation.

Validity and Reliability of the IDI
The 50-item IDI v.2 underwent rigorous validity and reliability testing (see Hammer, M.R., Bennett, M.J. & Wiseman, R., 2003). Further testing of the IDI v.3 with a sample of 4,763 in 2009 identified the following unidimensional scales (using Confirmatory Factor Analysis) along with their overall reliability (Coefficient Alpha):

Perceived Orientation (PO) Scale (.82) * Developmental Orientation (DO) Scale (.83) * Denial Sub-scale (.66) * Defense Sub-scale (.72) * Reversal Sub-scale (.78) * Minimization Sub-scale (.74) * Acceptance Sub-scale (.69) * Adaptation Sub-scale (.71) * Cultural Disengagement Sub-scale (.79).

Correlations among the Seven Sub-scales of the IDI
Table 1 below presents the intercorrelations among the seven dimensions of the 50-item IDI v.3. There is a strong correlation between Defense and Denial (r = .83) and between Acceptance and Adaptation (r = .64). Reversal is positively correlated with Denial (.36) and with Defense (.38) and not significantly correlated with Acceptance (.01) or Adaptation (.12). Minimization is not significantly correlated with either the more Monocultural orientations (Denial, Defense, Reversal) or the more Intercultural Orientations (Acceptance, Adaptation), suggesting Minimization exists as a transitional orientation between the more Monocultural and Intercultural orientations. Finally, there are negative correlations between Defense and Denial scales and the Acceptance and Adaptation scales. These findings provide support for the intercultural development continuum. The Cultural Disengagement scale, while not located within the intercultural development continuum, is correlated most strongly with Reversal, consistent with the conceptualization of Cultural Disengagement as a disconnection with one’s own culture.
Table 1: Correlations among Seven Orientations (Latent Variables): Sample: 4,763 Respondents

<table>
<thead>
<tr>
<th></th>
<th>Denial</th>
<th>Defense</th>
<th>Reversal</th>
<th>Minim</th>
<th>Accept</th>
<th>Adapt</th>
<th>Cul. Disengage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denial</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Defense</td>
<td>.830</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reversal</td>
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<td>.367</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minim</td>
<td>-.033</td>
<td>.062</td>
<td>.036</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accept</td>
<td>-.169</td>
<td>-.111</td>
<td>.012</td>
<td>.014</td>
<td>1.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adapt</td>
<td>-.185</td>
<td>-.084</td>
<td>.124</td>
<td>.144</td>
<td>.638</td>
<td>1.000</td>
<td></td>
</tr>
<tr>
<td>Cul. Disengage</td>
<td>.227</td>
<td>.110</td>
<td>.433</td>
<td>.007</td>
<td>-.073</td>
<td>.033</td>
<td>1.000</td>
</tr>
</tbody>
</table>

Denial  Defense  Reversal  Minim  Accept  Adapt  Cul. Disengage

The Perceived Orientation and Developmental Orientation Scores of the IDI

(IDI Handout)

Mitchell R. Hammer, Ph.D., IDI, LLC

The IDI v3 measures an individual or group's level of intercultural competence along a developmental continuum that ranges from Denial, Polarization (Denial/Reversal), Minimization, Acceptance, and Adaptation. The IDI individual and group profile report calculates a PO score (Perceived Orientation) and a DO score (Developmental Orientation). The PO score represents where the individual or group perceives themselves on this developmental continuum. The DO score represents where the IDI places the individual or group along the continuum (i.e., the individual or group's actual level of intercultural competence).

Derivation of the PO and DO Scores

The PO (Perceived Orientation) and the DO (Developmental Orientation) scores are determined using separate propriety formulas initially validated with a sample of 766 respondents and then a number of times later with samples of over 4,000 respondents. In order to produce the PO or Perceived Orientation score, an unweighted formula is used based on the mean scale values of Denial, Defense, Reversal, Minimization, Acceptance and Adaptation. The DO or Developmental Orientation score is calculated using a weighted formula in which scale mean scores of Denial, Defense, Reversal and Minimization are weighted and calculated compared to scale mean scores of Acceptance and Adaptation scale means.

The PO and DO profile scores represent standardized (z-score) scores where a score of “100” indicates the mean (50th percentile) with a standard deviation of 15. This standardized profile score is thus presented in the same format as other measures (e.g. IQ, where “100” represents the average IQ of individuals). The chart below illustrates this “normal distribution”.

Your Overall PO or DO score:

<table>
<thead>
<tr>
<th>Denial</th>
<th>Polarization (Denial/Reversal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.4%</td>
<td>13.5%</td>
</tr>
<tr>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>13.5%</td>
<td>2.4%</td>
</tr>
<tr>
<td>55</td>
<td>70</td>
</tr>
<tr>
<td>85</td>
<td>100</td>
</tr>
<tr>
<td>115</td>
<td>130</td>
</tr>
<tr>
<td>145</td>
<td></td>
</tr>
<tr>
<td>Acceptance</td>
<td>Adaptation</td>
</tr>
</tbody>
</table>

Standard Error of Measurement of the IDI (IDI Handout)
Mitchell R. Hammer, Ph.D.

The Standard Error of Measurement (SEM) of a test refers to the standard deviation of test scores that would have been obtained from a single respondent had that respondent been tested multiple times. It is a measure of the “spread” of scores within a respondent had the respondent been tested repeatedly and ad infinitum. That is, if a single respondent were to take the same test repeatedly and ad infinitum. That is, if a single respondent were to take the same test repeatedly (with no new learning taking place between testing’s and no memory of questions effects), the standard deviation of his/her repeated test scores is denoted as the Standard Error of Measurement.

The standard error of measurement can be estimated from a single testing of a population of respondents. From the test scores of a population of respondents on a single measure, one can easily compute estimates of the test score mean, test score standard deviation, and the test score reliability (notated as x, sx, and rxx, respectively). From these estimates, an estimate of the standard error of measurement, s_E, is computed using the following formula:

\[ S_E = sd_x \sqrt{1 - r_{xx}} \]

For the DS score, the sd_x = 8.5 and rxx = .831. Using this formula, the S_E for the DS score is 3.49. Since the reliability for the PS score is a little bit lower, we end up with a slightly higher S_E for the PS score, it is 3.66.

Generally, people will use the standard error of measurement to create a confidence interval around the obtained score and use that interval to estimate the true score. The formula for a 95% confidence interval is:

\[ 95\% \text{ CI} = X \pm 1.96*(SEM) \]

For example, let’s say someone has a DS score of 120. Our confidence interval would be:

\[ 120 \pm 1.96*(3.49) \]
\[ 120 \pm 6.84 \]
\[ 113.16 \text{ ---- } 126.84 \]

Hence, we can be 95% certain that a person with an observed score of 120 has a true score between 113 and 127 (after rounding). That’s a general summary of the standard error of measurement and how we use it.