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THE INTERCULTURAL DEVELOPMENT INVENTORY

An Approach for Assessing and Building Intercultural Competence

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♦ *Mary's Dilemma*

Consider the following situation.[1] It was 9 months ago that Acme Pharmaceutical Company formally agreed to a limited partnership arrangement with Jaca Marketing of Japan. The purpose of this partnership is to permit Acme to introduce a line of pharmaceutical products in Japan. Jaca is a well-respected and established marketing firm in Japan that knows the "ins and outs" of obtaining government approvals so that the medicines developed by Acme can be formally approved for sale to Japanese consumers. At the time of the signing of the agreements, both the president of Acme and the president of Jaca expressed their enthusiastic support for and confidence in the newly formed partnership. For Acme, Jaca represents an essential method of introducing pharmacological products into the Japanese arena. For Jaca, the opportunity to represent a large, U.S.-owned multinational corporation that wants to do

business in Japan solidifies Jaca's position as a premier partner for foreign corporations desiring to bring their services and products to the Japanese consumer.

You are an intercultural management consultant, recently hired by Acme to help ensure the success of the partnership with Jaca Marketing. Your main contact at Acme is Mary Jones, a European American female, age 35. Mary has been employed in the pharmaceutical industry for the past 15 years and is currently the director of international marketing for Acme and team leader for this critical project.

Soon after the contracts were signed, problems began to emerge that were largely unanticipated among key Acme and Jaca team members (who are responsible for coordinating this large project). Mary, as team leader from Acme, has particularly felt the brunt of confusion and misunderstanding with her marketing counterparts from Jaca. The following portrait seems to be emerging.

Acme team members are quite frustrated as their carefully negotiated business goals for each quarter during the past 9 months appear, from their perspective, to have been either ignored or incompetently addressed by the Jaca team. On numerous occasions, Mary has been briefed by her confused team about how they feel their Jaca counterparts are dropping the ball and not trying hard enough to obtain the proper government approvals. Until these approvals are given, the overall marketing effort remains in a holding pattern. In addition, many of the frontline Acme team members have commented that they feel they are not taken seriously and rarely receive a "straight answer" from Jaca.

Mary has heard from some of the Jaca team members that the American team members don't understand how "things are done" in Japan. Recently, the Jaca team leader communicated in an email to Mary that the Americans involved in this project are making the situation most difficult for the project to move forward in a timely manner. When Mary shared this information with her Acme team, they erupted with, "A timely manner! We are already 6 months behind on our agreed-upon objectives!"

Mary is perplexed. It is clear to her (and the Acme and Jaca team members) that (a) both organizations genuinely desire success for this partnership, (b) both organizations are in agreement concerning the goals and timeline, and (c) both organizations have committed sufficient financial and human resources to make this effort successful. After reviewing this situation, Mary has called you to come and help. What recommendations would you give Mary that would help restore confidence among both the Acme and Jaca team members? What actions would you suggest Mary take to specifically assess how cultural differences may be negatively affecting each group's effort at working collaboratively toward an agreed-upon set of goals?

In formulating your response, the information presented in this chapter will likely be most helpful in developing a strategic intervention for the Acme team members (and later, possibly, for the Jaca team as well). One of the key tools you may wish to add to your toolkit is the Intercultural Development Inventory (IDI). For example, you can administer the IDI to the Acme team members, and this will produce a profile of their collective capability to recognize and adapt to cultural differences between the American members and their Japanese colleagues. The IDI profiles can also be developed for individual team members. With this information, you would be able to engage in targeted, intercultural coaching of key team leaders that focuses on those cultural differences that are making a difference in the communication between the Acme and Jaca teams. In short, the IDI can provide the Acme team a clear picture of the way in which they approach the cultural aspects of their working relationship with Jaca. Armed with this information, targeted interventions can be undertaken to help the team members more effectively deal with the cultural differences that are negatively affecting the success of the project.

◆ Introduction

Corporate leadership gurus and educators alike recognize that the sin qua non of effective management in our global community is the development of intercultural competence at both the individual and organizational level (Adler, 1997; Barnlund, 1998 Harris, Moran, & Moran, 2004). Indeed, the ability to engage in effective interaction across cultures is a core capability in the 21st century not only for our business leaders but for our political leaders as well. Without systematic efforts at developing intercultural competence, our world community may well devolve into increased conflict and violence, fulfilling Samuel Huntington's (1996) observation that human conflict and violence in the new millennium will not be primarily generated from economic or ideological grounds but rather from the divide of cultural differences.

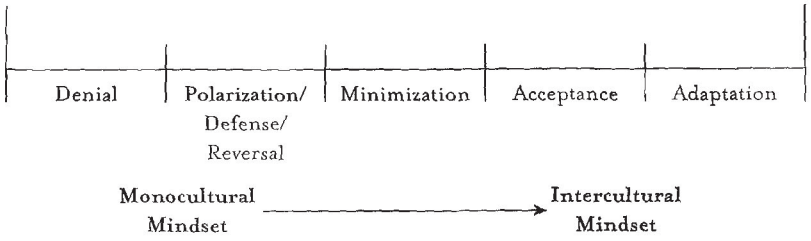
Historically, we have not had a sufficient "intercultural competence toolkit" from which to assess how "competent" an individual or an organization is in terms of working across cultures nor a framework from which systematic efforts at developing increased intercultural competence can be undertaken. With the development of the Intercultural Development Inventory (IDI) (Hammer, 2007; Hammer, Bennett, & Wiseman, 2003), our "toolkit" has been greatly expanded.[2] The IDI is the premier cross-culturally valid and reliable measure of intercultural competence. The IDI has direct application to global leadership, defined by Harris and colleagues (2004) as "being capable of operating effectively in a global environment while being respectful of cultural diversity" (p. 25). While a relatively new assessment tool, the IDI is already demonstrating significant impact with over 1,200 qualified IDI administrators from over 30 countries. Further, the IDI has been rigorously "back translated" (Brislin, 1970, 1976, 1980) into 12 languages, thus ensuring both linguistic and conceptual equivalence.

◆ What Is the IDI?

The IDI is a 50-item paper and pencil (and online) questionnaire with selected demographics that can be completed in about 15 to 20 minutes. Accompanying the IDI questionnaire are four open-ended "contexting" questions individual respondents may complete. These open-ended questions help further capture the experiences around cultural differences of the respondent. Once the IDI is completed, the IDI analytic structure generates an individual (or group) graphic profile of the respondent's overall position on the intercultural development continuum. This continuum, presented in Figure 16.1, identifies specific orientations toward cultural differences that range from more monocultural perspectives to more intercultural mindsets.[3]

The intercultural development continuum represents a progression from a less complex perception of and consequently a less complex experience of culturally based patterns of difference to a more complex experience around cultural diversity. What does it mean to say that an individual has a less complex or a more complex perception and experience of cultural difference? In general, it suggests that individuals who have a more detailed set of frameworks for perceiving and understanding patterns of cultural differences between themselves and others have the capability of then experiencing observed cultural differences in ways that approximate how a person from that other culture might experience the world (M. J. Bennett, 2004). The capability of shifting cultural perspective and adapting behavior to cultural context represents an intercultural mindset. In contrast, perceiving cultural differences from one's own cultural perspective is indicative of a more monocultural mindset.

Figure 16.1 Intercultural Development Continuum



◆ *Dimensions of Culture Differences*

While there are many and varied patterns of cultural difference that can be identified, Harris and colleagues (2004) offered a useful framework of 10 "culture general" dimensions of cultural difference that often can make a difference in our effectiveness in interacting with people from different cultural communities: (1) sense of self and space, (2) communication and language, (3) dress and appearance, (4) food and feeding habits, (5) time and time consciousness, (6) relationships, (7) values and norms, (8) beliefs and attitudes, (9) learning, and (10) work habits and practices. The underlying intercultural development continuum that is assessed by the IDI posits that individuals and groups have a greater or lesser capability to perceive differences between themselves and others that are "culturally grounded."

DEVELOPMENTAL AND TRAILING ISSUES

The IDI assesses a respondent's or group's primary orientation toward cultural differences (such as intercultural conflict styles; Hammer, see Chapter 17, this volume; Hammer, 2005) along this developmental continuum outlined in Figure 16.1. In addition, the IDI profile indicates key developmental, or "leading," issues that directly face the respondent that, when systematically addressed, can result in further progression along the continuum. Also, the IDI profile identifies "trailing" issues that are currently holding back the respondent or group from moving further along the developmental continuum. These trailing issues represent unresolved aspects associated with an earlier orientation. In this sense, the IDI profile identifies an individual's or group's primary orientation but also reflects the individual's experience of cultural differences in terms of the degree to which the respondent has resolved issues associated with earlier (and less complex) perspectives toward cultural differences. It also indicates the immediate challenges the individual faces in further developing a deeper set of perceptions and consequently a more complex experience of cultural diversity.

WHAT ARE THE CORE ORIENTATIONS TOWARD CULTURAL DIFFERENCES?

The intercultural development continuum identifies five core orientations that reflect a distinct set of perceptions and experiences around cultural differences. Movement along the continuum begins with the more monocultural orientations of denial and polarization (defense/reversal), through a more transitional mindset of

minimization, to the more intercultural or global mindsets of acceptance and adaptation. The capability to more deeply shift cultural perspective and adapt behavior to cultural context is most fully realized through the orientation of adaptation.

The monocultural orientations of denial and polarization (defense/reversal) reflect a view that "one's own culture is central to reality" (M. J. Bennett, 1993, p. 30) and is, therefore, more ethnocentric in the way individuals perceive and experience cultural diversity. At the other end of the development continuum lie the intercultural orientations of acceptance and adaptation. These orientations reflect a sense that one's own cultural patterns are "not any more central to reality than any other culture," that cultural differences need to be understood relative to one another, and culturally based actions and behavior must be seen within a specific cultural context (M. J. Bennett, 1993, p. 46). Between the more monocultural mindset and the intercultural orientations is minimization. Minimization is a transitional state between the more ethnocentric orientations of denial and polarization (defense/reversal) and the more intercultural states of acceptance and adaptation (M. J. Bennett, 2004; Hammer et al., 2003).

To add to the explanations in Chapter 8, the earliest developmental state is that of *denial*. Denial is most reflective of dominant culture individuals who have sparse experience with people from different cultural backgrounds. As a result, they often have a limited, stereotypic set of perceptions of the cultural "other." Other cultures and the differences they bring into social interaction are typically not recognized. Further, a denial orientation maintains a sense of disinterest and even avoidance of cultural diversity. In contrast, nondominant culture members are less likely to maintain a denial orientation toward cultural diversity, as these members often need to deal with cultural differences (in terms of the dominant group's practices) within the larger society. Denial represents a low level of capability for understanding cultural differences and adapting to these differences (which are likely to go unnoticed).

Denial in an organization can be expressed in terms of emphasizing the need for newly hired "diverse" members to fit in the culture of the company, the offer to help diverse members "learn the organization," and an overemphasis on maintaining historically derived core values and practices. The primary issue to be resolved is to begin to notice and confront cultural differences (M. J. Bennett, 2004; Hammer, 2007). This process begins to establish a set of categories for understanding cultural diversity.

Unfortunately, these emerging categories often take the form of stereotypes. It is this developmental process that typically leads an individual to adapt a more polarization (defense/reversal) orientation. A second factor that moves individuals from denial to polarization is that as more people from different culture groups move into one's community or organization, the need to increase interaction with people from these different groups arises.

This creates conditions for the emergence of *polarization*, a judgmental orientation grounded in a sense of "us" and "them." A polarization orientation can take the form of a defense or reversal perspective. *Defense* is an orientation in which perceptions are polarized in terms of "us versus them," where "our" ways of doing things are seen as superior to the way things are done in other cultural communities. There can also be a sense of denigration toward other cultural patterns. Overall, cultural differences are experienced as divisive and threatening. Cultural difference is seen as an obstacle to be overcome, and this sense of superiority can lead to overconfidence and a view that "our" way of doings things is the best way.

In an organization, defense can manifest itself in terms of an insistence that "minorities need to figure out how to get things done

in this organization" and an assumption that the goal of diversity efforts should be to help diverse members adopt our ways (with little awareness of the need or value of adapting to the ways of other, diverse groups).

A distinct orientation—yet a variation within polarization is that of *reversal.* Reversal, as the name implies, polarizes cultural differences into "us and them" but reverses that polarization, where the cultural practices and values of the "other cultural group" are viewed as superior to one's own culture. This can take the form of "going native" or "passing." Unlike defense, however, reversal consists of generally positive evaluations toward other cultures. However, these evaluations are also stereotypic and reflect little deeper cultural understanding of the other cultural community. In reversal, individuals are often uncritical toward other cultural practices and overly critical toward their own group. As such, they may idealize or romanticize the other culture (M. J. Bennett, 2004).

Whether polarization is more defense or reversal, the key resolution issue is to recognize the stereotypic nature of one's perceptions and experience of the other culture and to actively identify commonalities between one's own views, needs, and goals and that of the other.

This effort at focusing on shared commonalities (rather than what is experienced from a defense/reversal orientation as divisive differences) creates the conditions for the emergence of *minimization*—an orientation in which cultural difference is subsumed into more culturally familiar categories (M. J. Bennett, 2004). Minimization is a state whereby an individual may well be familiar with different cultures and aware of differences in cultural patterns (e.g., values, beliefs, communication styles). However, the approach taken in minimization toward these recognized cultural differences is to focus on more unifying frameworks within which the cultural differences may be better understood—albeit understood largely from one's own cultural perspective. A minimization perspective is able to recognize some patterns of cultural difference; but the orientation emphasizes dealing with these identified differences through a commonality lens that can mask underlying differences. Typical commonality frameworks can include an over-application of human (i.e., physical, psychological) similarity as well as universal values and principles.

For dominant group members, this emphasis on commonalities (generated largely from one's own cultural framework) may mask a deeper awareness of "privilege" and may lead to an overestimation of one's own cultural sensitivity or competence. For nondominant members, the experience of minimization can be different. That is, often nondominant members are aware of how privilege functions in the community and organization. Minimization therefore functions more as strategy for getting things done within a dominant cultural context. This can take the form, for instance, of "go along to get along." In this sense, minimization (the use of commonality strategies) is a way to focus attention away from deeper cultural differences to accomplish some set of goals (e.g., maintain cordial relations in the workplace).

At the organizational level, minimization tends to pursue efforts at structural integration and equity concerns and elimination of bias, prejudice, and discrimination. This is accomplished by establishing common policies, practices, and universal principles and values in the organization that clearly spell out the firm's commitment and activities to eliminate cultural, ethnic, gender, age, sexual orientation, and other group stereotypes and discriminatory behavior. Clearly these goals support improved intercultural relations. Nevertheless, they do not adequately address issues focused on valuing diversity and, even less, on adapting to cultural differences.

The issue for resolution in minimization is to deepen understanding of one's own culture (cultural self-awareness) and to increase understanding of culture-general and

specific frameworks for making sense (and more fully attending to) culture differences.

Resolution of this core minimization issue creates conditions for progression into an *acceptance* orientation—that is, as individuals begin to more deeply explore cultural differences, they recognize that these cultural patterns need to be understood from the perspective of the other culture. As this develops, an appreciation of the complexity of cultural differences arises. From this vantage point, individuals are now able to experience their own cultural patterns of perception and behavior as one of a number of different but equally complex sets of perceptions and behavioral patterns. Acceptance, therefore, involves increased self-reflexiveness in which one is able to experience others as both different from oneself yet equally human.

Individuals at the acceptance level are typically curious and interested in cultural differences and committed to the cultural diversity agenda. However, while they recognize and acknowledge the relevance of culture and cultural context, they are unclear on how to appropriately adapt to cultural difference. Within an organization, acceptance reflects a genuine desire to learn about and adapt to cultural differences.

The main issue of resolution for an acceptance orientation concerns value or ethical relativity. As Milton J. Bennett (2004) comments, "to accept the relativity of values to cultural context (and thus to attain the potential to experience the world as organized by different values), you need to figure out how to maintain ethical commitment in the face of such relativity" (p. 69). In other words, the primary task for further development is to reconcile the "relativistic" stance that aids understanding of cultural differences without giving up one's own cultural values and principles. Movement through acceptance therefore involves deepening one's perceptions of other cultures, demonstrating a willingness to understand different (and even abhorrent) cultural practices from that other cultural perspective, and an increased capability to weigh one's own cultural values alongside the values from the other cultural perspective in such as way as to make ethical judgments in which cultural differences are fully taken into consideration. These judgments are made, however, not by employing completely culturally relativistic criteria (i.e., what is judged good in another culture should remain so), but rather employing reflective consideration of one's cultural values and those of the other group that ultimately address the existential question, "What kind of world do we want to live in?" As Milton J. Bennett (2004) comments, "resolution of the issue of value relativity and commitment allows you to take the perspective of another culture without losing your own perspective" (p. 70).

As this occurs, conditions for the emergence of *adaptation* arise. Adaptation involves the capability of shifting perspective to another culture and adapting behavior according to cultural context. Adaptation involves the capability to at least partially take the perspective of one or more cultures, bridge between different cultural systems, and change behavior in culturally appropriate and authentic ways (Hammer, 2007). Adaptation is characterized by an increased repertoire of cultural frameworks and behaviors available to reconcile unity and diversity goals and a sense that one's living in a multicultural world demands intercultural competence (performance in adaptation). Within organizations, adaptation orientations encourage the development of intercultural competence/adaptation among *all* members. Further, domestic and international cultural differences are often used as a resource for multicultural teams and the organization as a whole.

The major issue to resolve in adaptation is how to maintain an authentically competent intercultural experience—one in which substantial cognitive frame shifting and behavioral code shifting is occurring such that an individual is able to experience the world in

ways that approximate the experience of the cultural "other."

The obvious question arises, "How can you have the *same* experience of someone who is from another culture?" Of course, the answer to this phrasing of the question must be, "I cannot have the same cultural experience as you do because I am not you nor am I a member of your cultural community." Yet this prompts the more important question: "Can you develop a perceptual set of categories of cultural difference as a new lens within which to sufficiently shift your perspective and adapt behavior to a culturally different context in ways that allow you to *approximate* the cultural experience of the other?" The answer to this question is yes. After all, many, many individuals achieve just this level of adaptation—we often call this being bicultural or multicultural. That is, the individual possesses a deep capacity to experience the world from two or more different cultural platforms. In short, they are authentically able to shift perspective and adapt behavior to cultural context. In this sense, to demonstrate complex intercultural competence is grounded in this adaptation capability.

Being bicultural/multicultural in adaptation does not suggest, however, that the individual also has developed a bi/multicultural identity. Indeed, the development of such an expanded identity "does not represent a significant improvement in intercultural competence" (M. J. Bennett, 2004, p. 72).

THE DISTINCTIVENESS OF CULTURAL IDENTITY

The IDI also assesses, as a separate and distinct dimension from those orientations placed along the developmental continuum, the degree of *cultural disengagement* an individual or group possesses. Cultural disengagement reflects a sense of being disconnected and not feeling fully a part of one's cultural group (Hammer, 2007). This sense of cultural alienation from one's own cultural group can arise from any number of experiences, including significant adaptation to one or more cultures. In this latter case, Bennett and Bennett (2004) suggested that "at some point, their sense of cultural identity may have been loosed from any particular mooring, and they need to reestablish identity in a way that encompasses their broadened experience. In so doing, their identities become 'marginal' to any one culture" (p. 157; see also J. M. Bennett, 1993).[4]

It is important to recognize, however, that cultural disengagement may arise from any number of other experiences—experiences that are not grounded in the developmental state of adaptation. For example, cultural disengagement may derive from an individual's collective experience of being rejected or made to feel deviant from his/her own cultural group. When this occurs, the individual may have the experience of alienation from his or her own group. This sense of cultural disengagement does not necessarily mean, therefore, that the individual is functioning at the developmentally complex level of adaptation. In fact, the individual may have limited experience with other cultural groups and therefore likely will not feel stuck between two cultural identities.

From the perspective of the intercultural development continuum, cultural disengagement is not developmentally a core orientation. Cultural disengagement as assessed by the IDI is therefore an independent dimension of one's experiences around cultural identification but is not an orientation that falls along the intercultural development (competence) continuum described in Figure 16.1.

To conclude, the IDI measures a number of core orientations toward cultural difference along an intercultural development continuum. These orientations range from more monocultural mindsets (denial, polarization, defense, reversal) through minimization to more intercultural mindsets (acceptance,

adaptation). In addition, the IDI also assesses cultural disengagement (alienation from one's own cultural group identity). This measure of cultural disengagement is independent, however, from the progression of core orientations that comprise the intercultural development continuum.

IS THE IDI VALID ACROSS CULTURES?

The psychometric testing of the IDI indicates that the IDI is a cross-culturally generalizable, valid, and reliable assessment of an individual's and group's core orientations toward cultural differences (Hammer, 1999; Hammer et al., 2003; Hammer, 2007). There have been three distinct versions of the IDI (v.1, v.2, and v.3).[5] Overall, these various tests clearly demonstrate that the IDI is a robust measure of the core orientations of the intercultural development continuum (and cultural disengagement) and that the assessment is generalizable across cultures.

IDI v.1

IDI v.1 was a 60-item measure derived from a sample of 312 culturally diverse respondents. The following scales and reliabilities were identified: Denial (10 items, α = .87), Defense (10 items, α = .91), Minimization (10 items, α = .87), Acceptance (10 items, α = .80), Cognitive Adaptation (10 items, α = .85), and Behavioral Adaptation (10 items, α = .80). In this first version, individual scale scores were obtained, but placement along the intercultural development continuum was not determined (Hammer, 1999).

IDI v.2

IDI v.2 was a 50-item measure, the development of which was undertaken based on a desire to develop additional measures for reversal and integration (as specified in the original DMIS theory) as well as the results from factor analytic research conducted on IDI v.1 by Paige, Jacobs-Casuto, Yershova, and DeJaeghere (1999). Therefore, a new sample of 591 individuals responded to 122 items. Analysis of these responses using confirmatory factor analysis (CFA) resulted in the best fit to the data of a five-factor model that consists of 50 items divided into the following scales: DD scale (13 items, denial/defense, α = .85), R scale (9 items, reversal, α = .80), M scale (9 items, minimization, α = .83), AA scale (14 items, acceptance/adaptation, α = .84), and an EM scale (5 items, encapsulated marginality, α = .80)[6] (Hammer et al., 2003).

IDI v.3 (Current Version)

Recently, I decided to undertake a more comprehensive testing of the IDI across culturally different groups (see Hammer, 2007, for a more detailed description of this additional research effort). I administered the 50-item IDI to a significantly larger, cross-cultural sample of 4,763 individuals from 11 distinct cross-cultural sample groups. These individuals came from the profit sector, international organizations, nonprofit organizations, and high schools and colleges. All participants completed the IDI in their native language using rigorously back-translated versions of the IDI unless English was the language of the organization (e.g., managers from the international organization took the IDI in English due to exceptionally high English language fluency).

Results from this more comprehensive confirmatory factor analysis (CFA) of the data enable empirical distinctions to emerge between the denial and defense orientations and between acceptance and adaptation perspectives, resulting in the following seven scales: Denial (7 items, α = .66), Defense (6 items, α = .72), Reversal (9 items, α = .78), Minimization (9 items, α = .74), Acceptance

(5 items, α = .69), Adaptation (9 items, α = .71), and Cultural Disengagement (5 items, α = .79). In addition, two composite measures were created. The Perceived Orientation score, computed using an unweighted formula, reflects where the individual or group places itself along the intercultural development continuum (PO, α = .82). The Developmental Orientation score (DO, α = .83) is computed using a weighted formula and identifies the main or primary orientation of the individual or group along the intercultural development continuum. The developmental orientation is the perspective the individual or group is most likely to use in those situations that involve cultural difference. Further, comparative CFA testing also shows these seven core orientations are the best fit to the data compared to either a two-factor model of monoculturalism and interculturalism or the five-factor model used in IDI v.2.[7]

Overall, these results testing IDI v.3 persuasively demonstrate the generalizability of the IDI across cultural groups. Additional analysis of the data by distinct sample groups also clearly demonstrates the culture-specific applicability of IDI v.3 (i.e., across specific cultural communities). In addition, the intercorrelations among the seven dimensions of the 50-item IDI v.3 support the developmental continuum and the relationships among the core orientations: (a) there is a strong correlation between defense and denial (r = .83), (b) there is a strong correlation between acceptance and adaptation (r = .64), (c) reversal is positively correlated with denial (.34) and with defense (.37) and not significantly correlated with acceptance (.01) or adaptation (.12), and (d) there are negative correlations between the Defense and Denial scales and the Acceptance and Adaptation scales. Cultural disengagement is most correlated with reversal (.43) and, secondarily, denial (.22) and not significantly correlated with defense, minimization, acceptance, or adaptation, supporting the sense that cultural disengagement is focused on the disconnection experienced toward one's own cultural group.

WHAT ARE THE MOST EFFECTIVE APPLICATIONS OF THE IDI (V.3)?

The IDI assesses how individuals and groups construe their social interactions with people from different cultural communities. To date, over 1,200 individuals have attended the IDI Qualifying Seminar (QS) to learn how to administer this assessment tool. Additional, more advanced seminars are currently offered to help these qualified IDI administrators effectively implement IDI guided-development efforts in areas such as individual coaching, team building, training needs assessment, program evaluation, organizational development, and basic research efforts.

A key area of IDI impact is helping individuals (e.g., managers) better assess their capability for recognizing and effectively responding to cultural diversity. Prior to the development of the IDI, managers and employees from different cultures in organizations often engaged in fruitless and at times divisive conversations around such questions as the following:

- Is there conscious or unconscious bias in the way we hire, train, and promote people from different cultures in our organization?
- To what extent is prejudice and racism present in our company?
- To what degree do our own organizational practices reinforce "privilege" in the way we do things in our firm?
- What does it mean when our annual employee survey indicates that people of color and/or women feel our organization is less open and less welcoming to culturally diverse managers and employees?

- How prepared are our human resources to fully engage the contributions of customers, clients, employees, and managers who are from different cultures?
- In our multicultural, global organization, how do we establish common frameworks, policies, and practices that create a sense of shared vision and at the same time value diversity?

These and other critical challenges around cultural diversity face our organizations in the 21st century. The IDI provides a powerful assessment platform from which to effectively engage these important questions in a deeper conversation. The IDI provides key insights on the capabilities of managers and employees for dealing with cultural differences. It provides a picture of both an individual's and a group's primary orientation toward cultural differences—and this orientation frames how each of the questions above will be addressed.

WHO SHOULD ADAPT TO WHOM?

One common question I am often asked when I consult with organizations around issues of cultural diversity is, "Who should adapt to whom?" Answers to this question range from neither party should adapt to the other to mutual adaptation among the parties. If one's goal, however, is to more deeply understand and relate to cultural practices, values, and behaviors different from one's own, then intercultural mindsets (e.g., adaptation orientation: the capability to shift cultural perspective and appropriately adapt behavior to cultural context; Harris et al., 2004; Wurzel, 2004) are more helpful than monocultural (ethnocentric) mindsets (e.g., denial, defense, reversal orientations; M. J. Bennett, 1993; 2004). An IDI profile of key leaders and the larger group profile of the organization can reveal what perspectives will be taken in answering the question "Who should adapt to whom?" and what specific company policies, training programs, and other interventions will likely be recommended. Further, the IDI profile results also indicate which of these perspectives and actions taken will likely be more or less effective in achieving a more interculturally capable and responsive organization.

For individuals and groups with a primary orientation of denial or defense, this question often reflects an underlying concern that an increase in cultural diversity in the organization is threatening the core values and practices upon which this organization's success and viability is based. From this orientation, it is often recommended that the organization create opportunities for newly hired, culturally diverse managers and employees to "learn the ropes" and gain a sense of how things need to done "around here." Unfortunately, this approach demands assimilation (one-way adaptation) from cultural diversity. The result is that culturally diverse resources are not able to fully contribute to the organization's core mission: They often feel less a part of the company, they are often at a disadvantage for promotions, and they perceive little opportunity to bring culturally different perspectives, values, or practices to the attention of the organization at large.

In contrast, a primary orientation of minimization would answer the question, "Who should adapt to whom?" by recognizing some of the differences culturally diverse groups bring to the organization and be open to changing current policies and practices based on this understanding of differences but would attempt to find or establish a set of common standards and policies believed to apply equally (i.e., better) to all members of the organization. This effort will serve many productive purposes when focused on issues of racism and prejudice in the organization.

However, this effort will fall short when applied to management practices, performance appraisal processes, and other "interactive" arenas within which cultural differences emerge. In these more interactive situations, a limited focus only on common solutions will likely mask culturally grounded, different ways people may deal with disagreements, how emotion is expressed, how problems are addressed, how feedback is given, how goals are established, and how work is organized. In these areas, minimization can create a situation in the organization where culturally diverse resources are not valued and the insights and practices available to the organization from this cultural diversity in the areas of human management and performance are not activated. For people who possess these culturally different resources, they will likely employ minimization as a strategy to get along in a minimization-dominated organization. The result is that culturally diverse resources are not fully integrated into the life of the firm.

Finally, a developmental orientation of acceptance or adaptation would likely respond to the question of "Who should adapt to whom?" with a clear statement that mutual adaptation is expected among all managers and employees. From these perspectives, a deeper search for and consequently a deeper recognition of those cultural differences that are present among diverse resources in the organization is completed. With this more complex understanding of how people construe their experiences in the organization (e.g., planning, organizing, leading, communicating), more effective decisions around cultural differences and their contributions can be realized. From the acceptance and, even more, the adaptation orientation, all members of the company are learning to adapt to cultural context and are gaining valuable intercultural skills in the process.

Overall, the IDI is appropriate to use with a wide variety of people and organizations. It can be effectively employed for individual assessment and coaching. When used in this way, the IDI profile becomes an important tool for the individual—one in which developmental issues and trailing issues are identified and learning activities agreed upon in order to progress along the intercultural development continuum.

The IDI can be used to assess a group's capability to deal with cultural differences. When used in this way, the IDI becomes a blueprint of the group's overall capabilities and can help identify the struggles the group will likely encounter as they attempt to work together to accomplish tasks that involve bridging across cultural difference.

The IDI provides a benchmark assessment of an organization as a whole. This can help pinpoint areas of development in various divisions and management levels throughout the company. The IDI can also be used as a training needs assessment. Knowing, for instance, the percentage of denial, defense/reversal, minimization, acceptance and adaptation developmental orientations within a training population can better target and leverage the specific training interventions created. For example, training programs that emphasize a more sophisticated understanding of patterns of cultural difference will likely be more effective with minimization, acceptance, and adaptation orientations. These same programs might reinforce simpler stereotypes among denial and polarization (defense/reversal) orientations, as these orientations do not have a sufficiently complex understanding of what a cultural difference is (compared to a personality difference, for instance) to adequately apply these more complex frameworks to understand patterns of cultural difference.

Finally, the IDI can be used to evaluate various programs. It has been successfully used, for example, to evaluate a range of programs, from corporate training to study-abroad programs in high schools and

colleges. Additional areas where the IDI shows promise is in law enforcement, the court system, military operations, and the diplomatic community.

To conclude, the IDI provides a conversational platform within which to engage the "other" in a deep and genuine conversation around cultural diversity concerns. In addition, the intercultural development continuum provides a blueprint for how to encourage and assist individual and group development toward greater capability to shift cultural perspective and adapt behavior to cultural context. Why is this important? To quote the Vulcan greeting from *Star Trek*: "Greetings. I am pleased to see that we are different. May we together become greater than the sum of both of us."

♦ Discussion Questions

1. As you reflect on your own experiences with cultural differences, where do you think your primary orientation is located along the intercultural development continuum?
2. Identify specific situations you have observed or been involved in which a denial, defense or reversal orientation was used.
3. Identify specific situations you have observed or with which you have been involved in which a minimization orientation was used.
4. Identify specific situations you have observed or with which you have been involved in which an acceptance or adaptation orientation was used.
5. How might minimization strategies be useful in reducing prejudice and even violence between cultural or ethnic groups in our world?

♦ Notes

1. This is a composite case based on a set of real events that reflects issues around cultural differences that can be involved in startup operations and joint-venture operations that are initiated outside one's own culture. The names of the individuals and the companies are hypothetical and do not represent real persons or corporations.

2. All versions of the IDI (v.1, v.2, and v.3) are solely owned by Mitchell R. Hammer, PhD. The current version (v.3) of the IDI and its analytical structure was developed by Mitchell R. Hammer, PhD. The IDI v.3 is revised from earlier work on the IDI (v.1 and v.2) developed by Dr. Hammer and Milton Bennett, PhD (see Hammer, Bennett, & Wiseman, 2003, for a detailed review of the methodology used in developing earlier versions of the IDI).

3. This intercultural development continuum and the associated orientations toward cultural differences are adapted from Bennett's (1986, 1993, 2004) Developmental Model of Intercultural Sensitivity (see, for example, recent application of this developmental approach to international education in Wilkinson, 2007). An additional orientation initially identified by Bennett (1986), termed "integration," is concerned with the construction of an intercultural identity. This orientation is not, however, conceptually related to the development of increased intercultural competence (Bennett, 2004). In addition, the IDI also assesses cultural disengagement—the degree to which an individual or group is experiencing a sense of alienation from their own cultural community. This is a separate dimension assessed by the IDI and is conceptually located (and empirically verified) outside of the developmental continuum.

4. Bennett and Bennett (2004) and J. M. Bennett (1993) have termed this sense of marginality "encapsulated marginality" and theorize that encapsulated marginality is one form of the DMIS orientation of integration (the other form being constructive marginality). As proposed by the DMIS model, the condition of encapsulated marginality is where "one's sense of self is stuck between cultures in a dysfunctional way" (Bennett & Bennett, 2004, p. 157). The notion of *cultural disengagement* assessed by the IDI is not the same as encapsulated marginality.

Cultural disengagement involves a sense of alienation from one's own cultural group. This does not imply that the individual's identity is somehow between two different cultures in a dysfunctional way. What it measures is simply this sense of feeling disconnected from one's own group identity. The empirical results suggest that cultural disengagement as assessed by the IDI in fact is not significantly more related to an adaptation orientation than any of the other orientations. That is, an individual can experience high or low levels of cultural disengagement across all of the developmental orientations (Hammer, 2007). In this sense, as stated earlier, cultural disengagement functions within the IDI as a distinct and separate construct and measure and is not conceptually situated as a "developmental orientation" along the continuum.

5. Developing the IDI (v.1, v.2, and v.3) involved a number of protocols, including (a) in-depth interviews of 40 individuals from a variety of cultures and preparation of verbatim transcripts of these interviews, (b) inter-rater reliability testing to determine whether the discourse of the respondents reflects core orientations delineated in Milton J. Bennett's (1993) DMIS model, (c) listing of all statements made by each respondent that are indicative of the agreed-upon developmental orientation followed by a review (for redundancy, word clarity, etc) of these statements by two cross-cultural pilot groups, (d) rating of the remaining statements (randomly arranged) by a group of seven cross-cultural experts (expert panel review method) in terms of whether the items clearly reflect an identifiable core orientation, (e) submission of the remaining items to factor analysis (IDI v.1) and confirmatory factor analysis (IDI v.2 and v.3), and (f) content and construct validity testing of the IDI with modified versions of the Worldmindedness Questionnaire and an Intercultural Anxiety questionnaire. Additional testing found no significant correlations of the IDI with social desirability (Crown Marlow Social Desirability Index) and no significant systematic effects on the IDI in terms of gender, educational level, and age.

6. In version 2 of the IDI, the Cultural Disengagement scale referred to earlier in this chapter was labeled the Encapsulated Marginality scale. However, as more data have been gathered since the development of IDI v.2 concerning the correlations of this scale to other scales in the IDI, this scale has been renamed Cultural Disengagement in IDI v.3 to better reflect its independent status within the developmental continuum.

7. Byrne (1998) noted that "evaluation of model fit should derive from a variety of sources and be based on several criteria that can assess model fit from a diversity of perspectives" (p. 103). This suggests that a number of criteria should be brought to bear on assessing the adequacies of different models. These criteria typically include parsimony, cross-sample consistency, interpretability, and theoretical relevance. In some cases, the application of these various criteria may result in equivocal recommendations. When this occurs, it is the researcher who ultimately determines what is best, given the empirical evidence and theoretical constructs being tested. This speaks directly to the validation study for IDI v.2 (Hammer et al., 2003) in which there was evidence that could have led to the choice of the seven-dimension model and evidence that led to choice of the five-dimension model. At that time, the criterion of parsimony suggested that the five-dimension solution rather than the seven-factor model (the original DMIS conceptualization) be accepted. However, research should be evolving and developmental; it should assist in refining and amending our theoretical notions of the phenomenon under study. The current results testing IDI v.3 on a more extensive sample that is more culturally diverse clearly indicate the following core orientations, denial, defense, reversal, minimization, acceptance, and adaptation, which comprise the developmental continuum along with the separate measure of cultural disengagement.

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