

Discovering the Intercultural Development Inventory (IDI)

A reliable and valid measure of intercultural competence

By Patrick Schmidt

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(Slide 1)* Good afternoon. I'd like to begin this talk by telling you a story. It's about Jürgen, a young, brilliant executive, working for one of Germany's automobile companies. Now, I say brilliant because by the age of 27, Jürgen had already become the personal assistant to the CEO. He was not only quick and super-smart, but was also perceived as being flexible, open-minded and always accomplished his tasks with 110% Teutonic efficiency. The Board of Directors liked Jürgen and felt he had a high potential in becoming a Member of the Board. But they told him he needed to round off his skills with a two- or three-year foreign assignment. So, they decided to name him CFO at their Brazilian subsidiary. This was an extraordinary promotion for such a young person. As preparation, Jürgen and his wife were given four weeks of Portuguese language training. Then, it was off to Sao Paulo, where he took on his new responsibilities with great enthusiasm.

First day on the job Jürgen found, to his complete surprise, that the people in the finance department didn't keep all records of price changes. At that time, Brazil was suffering from run-away inflation of about 1100% per year, which meant prices were changed four to five times a day. When he asked his Brazilian subordinates why they didn't keep all financial records, they just replied, "We don't have time to note all the price changes. But don't worry; we know what we are doing. We always make money". Jürgen didn't like this disorderly way of doing things. Guided by his German value *Ordnung muß sein*, he ordered them to write down all price changes. To no avail. His Brazilian staff refused to change their methods. This battle of who was going to set policy went on for six weeks. Finally, after seeing he couldn't get them to change, Jürgen threw in the towel and flew back to Germany.

Because of this fiasco abroad, Jürgen's future career prospects had been put on hold. But worst, he became the laughing stock of the whole company. People were saying, "Ha, ha, ha. He thought he was so smart and yet, when he was sent abroad, he failed miserably".

* Slides found at the end of this publication.

What conclusions can we draw from this story? I think there are two: First: Although Jürgen was confident, highly intelligent, and possessed a strong will to see projects through, he was short of the most important skill when dealing with foreigners — intercultural sensitivity, that is the ability to communicate and behave appropriately in a new culture. No one had made him aware before his departure that he would unconsciously project and try to impose his German cultural values on to the Brazilians.

Second: If your orientation to cultural differences is not made clear before going abroad, huge and expensive fiascos are guaranteed.

This is where the Intercultural Development Inventory comes in. More commonly known as the IDI, it's a short paper and pencil survey of an individual's sensitivity to cultural differences. If, before his departure, Jürgen had been given feedback on his intercultural preferences by means of the IDI, it would have promoted greater self-awareness and lowered potential misunderstandings.

With this anecdote I'd like to begin my presentation of the IDI. Three points will be covered: first, I'll introduce the theoretical framework on which the IDI is based. Two, how to use and administer it and finally, show and explain an example profile. At the end of my talk, we will have a discussion on the merits of IDI.

Now, what does IDI do exactly? (Slide 3) It measures your orientation to cultural difference and the results are transformed into a graphic profile, which indicates where you are in terms of intercultural development. And when I talk about intercultural development, I mean, whether your worldview is ethnocentric — perceiving your reality only from your own cultural perspective or ethnorelative, which means you're comfortable with many standards and customs in different cultures.

The IDI was developed by both Milton Bennett and Mitch Hammer over a six-year-period. Since then it has been piloted and implemented in corporate and educational settings, proving to be a reliable and valid measure of intercultural competence,.

But when I say this, people immediately raise the question; how can you measure intercultural competence in a reliable, that is consistent, and valid way, and here I mean, do the test results mirror actual intercultural competence? Well first, we need to define intercultural competence. (Slide 4) For this talk, I'll use what I said a minute ago: the ability to communicate and behave appropriately in a new culture.

But then, how do can you empirically measure this ability? After all, it's non-tangible. The answer is found in Milton Bennett's Developmental Model of Intercultural Sensitivity, more commonly known as the DMIS.

(Slide 5) Published in 1986, the DMIS is a theoretical framework that explains how people make

sense of cultural differences and their reaction to them. Dr. Bennett observed in both the academic and corporate worlds that individuals confronted cultural difference in predictable ways. Based on this observation he made then the following assumption: as your experience of cultural difference becomes more complex and sophisticated, your competence in intercultural relations increases.

Each stage indicates a particular perceptual mode and behavior. By recognizing the underlying cognitive orientation toward culture difference, you can make predictions about people's behavior and training can be tailored to facilitate development into the next stage.

He organized these observations along a developmental continuum of six stages. As you can see, the first three are ethnocentric and the last three are categorized as ethnorelative. This framework is considered by many intercultural professionals as the best explanation of what an individual goes through when developing intercultural competence. Now, let me now explain each stage in more detail.

(Slide 6) Denial is the most basic stage of ethnocentrism. Your outlook is essentially parochial. You assume that your cultural reality is the only real one and there are no real differences among people from other cultures. You're comfortable with your familiar surroundings and not eager to complicate your existence with cultural differences.

Although you might be a witness to a tremendous number of foreign cultural experiences, you generally fail to make something out of them. That is, there is no successive construing and re-construing of unfamiliar events: they are simply not being registered. An example of this sort of aggressive ignorance might be seen among some American high school students, who, for the first time, go abroad to Germany. They have just come back home after a one-week stay in Munich and are asked about their impressions of Germany. They say it's "just like home." When questioned what they meant by that, the reply might be, "Well, Munich has lots of buildings, too many cars and McDonald's".

Or let me tell you about the experience of an American technician who I had as a participant in one of my intercultural trainings. He name was Gary and came from a small town called Plymouth, located in the middle of Indiana. A German company set up operations in his area and he was hired and sent to Germany to do company training for six weeks. This was his first time out of the United States. Two weeks after his return, I asked him about differences he might have noticed between Americans and Germans. Gary replied that there weren't any. Surprised, I said "You must have observed some differences." Again, he stated emphatically there weren't any. A German in the class was astonished by what he heard and insisted that he must have observed some differences. Finally, Gary said: "Well, the Germans seem to be bit more precise than Americans." After hearing that, I thought about his statement and drew the following conclusion: when Gary was in Germany, he probably felt so overwhelmed and threatened by cultural differences that he reacted by denying his German experiences, in order to protect his identity.

(Slide 7) Gustave Doré's illustration of Red Riding Hood meeting the big bad wolf.

(Slide 8) The next stage is Defensive. Here, you don't deny cultural differences — on the contrary, you're conscious of them, but you generally don't like them. These differences are considered a threat to your self-esteem and identity. As a result of this, you often create negative stereotypes in order to promote an internal feeling of superiority and the "rightness" of your own value system. In another words, your own culture is experienced as the only good one and all others are inferior.

Let me give you an example of this. I often do intercultural training for German engineers, who have just started to live and work in the USA. The scenario is always the same: at first they're euphoric about being in the USA, but after a few months, culture shock kicks in and suddenly these engineers find themselves lost and disoriented. So, what do they do to counteract these feelings? They become highly critical of the U.S.A., irrationally displacing their frustration and anxiety onto the host nation. In this context, defensive statements are often made such as: "Americans are superficial and uncultivated" or "We could teach these Americans a lot about being orderly."

There's a variation to this called reversal. A person in the reversal stage has a largely positive view of their newly adopted culture and a somewhat negative opinion of their own native culture. An example: a young Peace Corp volunteer is sent to, let say, Costa Rica, and after 6 months there, he or she thinks it is better than the USA. People say that person has "gone native". According to Milton Bennett, the reversal orientation is the "mirror image" of the defense orientation and thus is also ethnocentric. Because of time constraints, I can't go more into details.

(Slide 9) "We serve whites only" picture.

(Slide 10) The DMIS predicts that as time goes by, people move from the defensive into the Minimization stage. As the term suggests, cultural differences are minimized or trivialized, while at the same time there's an emphasis on how people are all similar and a belief in the universality of basic values.

But you're still essentially obscuring deep cultural differences because your notions of universality are defined in terms of your own culture. Example: you're a Peace Corp volunteer in a Peruvian village and you believe there's a universal need to be successful and the people in this village should be grateful that you are teaching them this. When you find that Peruvians don't identify with this value, you might react by saying the following: "Why can't they be just like us Americans?"

Other statements of universality are, for instance: "We are all children of God" or "I have this intuitive sense of other people, no matter what their culture is." There's also this belief of just being yourself and human will suffice. So, you might hear the following: "The key to getting along in any culture is to be authentic and honest!"

When you are in the minimization state, you're excessively respectful of other cultures and see yourself as well-meaning and kind. You seek to avoid stereotypes by viewing and judging others as individuals. Today, we call this being "politically correct."

However, in many cases, you aren't aware that you might be a member of a dominant culture with institutional privileges. Example: At the SIETAR Congress in Sofia last year, Hungarian and Bulgarian members told about their contacts with Western European and American business people who wanted to introduce (in reality impose) Western business methods in Eastern Europe. These Westerners were polite, respectful and saw themselves as being open with good intentions. They would downplay differences by making remarks, like "We business people are all the same all over the world". What they didn't realize that they were members of a dominant culture that had the economic upper-hand and could dictate what was going to be done. Consequently, they were perceived by the local population as privileged, patronizing and imperialistic.

(Slide 11) Seeing oneself as well-meaning. Illustration "Les Médecins" by Gustave Doré,

(Slide 12) Acceptance is the first of the three ethnorelative stages. Here, there is a fundamental shift in the mindset from the unconscious assumption that your culture is the definer of reality to a more conscious assumption that your own culture is just one of many, equally complex worldviews. Acceptance does not mean agreement — some behavior may be judged as immoral and repugnant — but your judgment is no more ethnocentric. Rather, there's an acceptance of cultural differences in verbal and non-verbal behavior. You come to the realization that the ideas, feelings and behavior of others are just as rich as yours. In this stage, you are curious about other cultures and enjoy recognizing and exploring differences.

Example: I conduct intercultural trainings for American college students, who come to Germany on a 3-month exchange program. By the end of the program, most students have a better understanding of Germans, but are not quite out of the minimization stage because their stay in Germany is too short for any significant transformation to occur. However, in one of my classes, one student fell in love with a German during her stay. Suddenly, her attitude was changed from an American ethnocentric outlook to a strong urge to learn everything about Germans and Germany. She told me enthusiastically: "I want to learn German well so I can understand my Hans better".

(Slide 13) Curiosity of others - Gustave Courbet's painting "Bonjour"

(Slide 14) The second ethnorelative stage, Adaptation, involves a more proactive, conscious effort to internalize other cultural realities. At this stage, you have the ability to "step into another person's shoes". It's a form of empathy, role reversal, where you intentionally shift your frame of reference for the purpose of connecting. Your goal is to maximize communication with people from other cultures.

I lived five years in Montreal, a fascinating bicultural and bilingual city of Francophones and Anglophones. The two groups usually don't get along that well and normally live in separate communities. Despite that, there are some inter-marriages and the children of these culturally-mixed unions develop a worldview with two cultural frameworks. They could be mingling with their Anglophone friends, speaking and behaving in their Anglo mode and should a Francophone appear, they could immediately shift their communication style to that of the French: "As I was saying... Oh, salut Jean, comment vas tu?"

(Slide 15) Empathy, picture of clasping hands

(Slide 16) The final ethnorelative stage is Integration. It could be described as a continual shifting of different cultural worldviews. In this stage, you're what I call, "cross-cultural swingers", juggling two or more competing value-systems. You're capable of seeing and feeling the relativity of beliefs — you feel there is no absolute standard of "rightness" because you use multiple frames of reference. This can cause you to lose your primary cultural identity and create what might be described as internal cultural shock — existing on the periphery of two or more cultures, what Milton Bennett calls a sort of cultural marginality. This is common among long-term expatriates, "global nomads" and "third culture kids".

The Czech writer Milan Kundera coined the phrase, "the unbearable lightness of being" to describe how life is ultimately insignificant. When you add "intercultural" at the end, it becomes "the unbearable lightness of being intercultural." Long-term expatriates will smile and say "Yeah, that sort of describes my mental state." Despite the periodic confusion in their identity, people in the integration stage will often say, "I truly enjoy participating in all these cultures".

(Slide 17) Multi-frames of reference, René Magritte's painting "The Human Condition"

(Slide 18) Now that you have become familiar with the DMIS, we can look into the actual administering of the Intercultural Development Inventory, which can be given to individuals or groups. Before the IDI is passed out, the respondents are given a small introductory talk on the meaning of intercultural sensitivity and the challenges facing cultural differences. The actual DMIS is not explained at this stage.

The IDI is then handed out. As I said earlier, it's a paper and pencil instrument composed of 50 statements, each statement reflecting a different stage of the DMIS. For example "People are fundamentally the same despite apparent differences in cultures" or "I feel rootless because I do not think I have a cultural identification". It takes about 20 to 30 minutes to complete. Responses are scored on a one-to-five-point Likert-type scale. For example, take the statement: "I like people from different cultures." If you "agree" fully with this, you would fill in the number "5". If you "disagree somewhat more than agree", you would fill in the number "2" and so on.

The results are then compiled into a special computer software, which in turns generates a in-depth graphic and textual profile of an individual or group's predominate stage of intercultural development. When the respondents received their results, they invariably ask, "what does this mean to me?" and it's at this stage, a process of self-reflection begins. This phase is what people find the most fascinating because they're discovering and learning about themselves, leading to increased intercultural sensitivity.

Additionally, the IDI also indicates how you rate yourself in terms of intercultural sensitivity. I mention this because it's important for administrators to have a sense of the discrepancies on how a person rates their perceived strengths in intercultural sensitivity versus the more objective assessment provided by the IDI.

A frequent question I get is how did Dr. Bennett and Dr. Hammer find the statements that would reliably measure intercultural sensitivity. When they started the project back in 1993, the two researchers conducted extensive interviews with 40 international people about their experiences with cultural diversity. Four raters then categorized the interviewees' statements, according to the different stages of DMIS. It was then reviewed by a team of seven experts who removed those items that were not similarly classified by at least five of the seven experts. This resulted in an inventory of 145 statements that corresponded to five of the six DMIS stages. Later, they were then tested on a sample of 226 international respondents, which resulted in the final set of 50 statements. This whole period of developing and refining the IDI spanned six years.

(Slide 19) The IDI should be viewed as an instrument that captures how the person tends to think and feel about cultural differences. It measures cognitive structures, that is how a person construes and organizes events, rather than attitudes. This makes it more stable and less susceptible to situational factors.

Important here, it doesn't compare behaviors. Most other tests of "intercultural competence" are criterion-references, in that they compare in terms of percentages how close the respondent matches a set of behaviors thought to be associated with intercultural competence. Consistency and quality for such tests are more difficult to establish.

The IDI has met the standard scientific criteria for a valid and reliable psychometric instrument. The editors of *The International Journal of Intercultural Relations* conducted an in-depth analysis of the instrument, and concluded that "it reasonably approximates the developmental model of intercultural sensitivity". The IDI is also related to other standardized tests. The three ethnorelative stages — acceptance, adaptation and integration — correlate positively with the *Worldmindedness Scale*. Likewise, the ethnocentric stages — denial, defence and minimization — correlates positively with the *Intercultural Anxiety Scale*.

Up to now I have been talking about the theory and development of the IDI and how to administer it.

Let's now look at a concrete example of how the instrument measures intercultural competence. I'm going to show you the IDI results of "Joe", a construction contractor in Colorado. But before I do that, let me read you his profile.

Joe is a European American male who resides in a city close to where he was born. He traveled once to Alabama and Mississippi, where he was "shocked by the segregation". He is a very successful construction contractor with a reputation for being a truly nice (and effective) guy. He is often in multicultural situations, both with outside contractors and with the workers he manages (the vast majority come from Mexico, who he fondly called his "Mexicans". He said this, despite the fact there were other nationals, such as the El Salvadorians, Guatemalans and Costa Ricans).

Joe's attitude toward multi-cultural groups is that "those of us who are successful should reach back to bring others along". He firmly believes companies should create apprenticeship opportunities for minorities, so that can "learn the ropes" and have a chance for advancement. In this context, he would often tell his workers to stop speaking Spanish among themselves and to practice their English. In multicultural situations, he thinks that it is important to just "be yourself" and other people will respect you. This got him into disagreements with his workers, when he told them proudly "American cowboy Western music is far better than that Mexican music".

Concerning cross-cultural and diversity training for his company, Joe thinks that it is important to say, "We got it done". The training should teach people not to stereotype or pigeon-hole people. He is concerned about white men being discriminated by minorities, known as white male bashing, since he doesn't think that anyone is really racist in his company. In this context, however, he's somewhat disappointed that his workers just accept him, but don't show a genuine liking to him. After all, he states openly that he's not a "racist".

In short: A very nice guy, well intentioned and competent in his work. But he seems somewhat blind and ignorant to cultural difference, along with underlying patronizing and know-it-better attitudes.

How would you rate his intercultural sensitivity? Is he in the ethnocentric or ethnorelative mode? As you probably correctly guessed, Joe is basically still in the ethnocentric mode. But how deep is his ethnocentricity? Let's look now at his IDI results.

(Slide 20) Here's the first page. Let me explain the very top two parts, dimensions and scales. The dimension part corresponds to the DMIS framework, which you are now aware of. The second part corresponds to the scales of the IDI. When developing this instrument, Dr. Bennett and Dr. Hammer found the denial and defense stages often overlapped, so they put them together, calling it the DD scale. There is also the "R" scale, which measures a worldview that reverses the cultural orientation. The next scale is minimization. Acceptance and adaptation were also found to overlap often, so they were fitted together as one scale. The last is encapsulated marginality, corresponding to integration. This measures a worldview that incorporates a multicultural identity with sometimes confused cultural perspectives.

The next line shows how Joe perceives his own intercultural sensitivity, which is at the end of minimization. However, on the next line, the IDI measures him to be still in the denial/defensive mode, which is two scales below his self-assessment. That he personally overrated himself is normal and very human. All of us basically have a better self-image of ourselves than what we actually are.

Going down to the Worldview Profile, we see on the first scale that Joe is still in the transition phase of the DD scale. This means, Joe is still dealing with issues, by which he is simplifying or polarizing cultural difference. Example would be when he said “my Mexicans” while ignoring there were other nationalities. This also means that his experiences with cultural differences may be somewhat negative, with a tendency toward disinterest in cultural difference and/or a tendency toward avoidance of interaction with culturally different people. Furthermore, we could say that there is a tendency for Joe to view the world in terms of “us” and “them”, where “us” is superior. “American Western music is far better than Mexican music”

The “R” scale indicates that it is resolved. It means that Joe is not affected by a tendency think of other cultures as being superior to his own.

On the “M” scale, we can see that the issues in this stage are still unresolved, or as Dr. Bennett would say, “there are still many trailing issues”. Joe’s philosophy toward cultural difference is to emphasize commonality or universality, meaning an ethnocentric worldview. He seems to have a strong commitment to the idea that people from other cultures are basically “like us”. When he states, “just be yourself” or that “they can learn the ropes”, he is unconsciously imposing U.S. values on his foreign workers, assuming that they want to be like him. All this reflects difficulties in identifying important cultural differences that influence intercultural relations. Joe needs to resolve them before he can realize a greater potential of intercultural competence.

On the “AA” scale, Joe is in the “transition” area, indicating that he is dealing with issues around the acceptance of or adaptation to cultural difference. Due to the unresolved issues in the “M” scale, he is having difficulty in experiencing the existence of other cultures fully, or probably is not yet able to shift his perspective or behavior easily into other cultural contexts.

Lastly, on the EM scale, Joe’s resolved area indicates that he is not experiencing identity cultural issues for the simply reason he is still ethnocentric. He perceives all things from one cultural perspective and not from multi-cultural perspective. This is the first page of the IDI results. There are two more pages, which provides deeper explanations of the first page.

This was a short and quick overview of how the IDI measures intercultural sensitivity. The question now is: where and when do you use IDI? The IDI is used in business, education, the non-profit and government sectors. Applications include:

- individual feedback coaching for an executive about to leave for an overseas assignment
- team building after your company has re-organized itself into a global unit and awareness of cultural differences is a key factor for success

- Overcoming misunderstandings that have arisen between staff and members from multicultural groups

Perhaps the most positive outcome of the IDI is that you develop a greater self-awareness about your intercultural sensitivity. For this reason, the IDI has the added benefit of being both an assessment instrument and a potential vehicle to promote intercultural skill development.

(Slide 21) I do hope my talk has provided you with a better idea on the benefits of IDI. Should you wish to have any further information, you may wish to contact me through my webpage: www.patrickschmidt.org. I thank you very much for your attention.

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Intercultural Development Inventory (IDI)

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of intercultural competence*



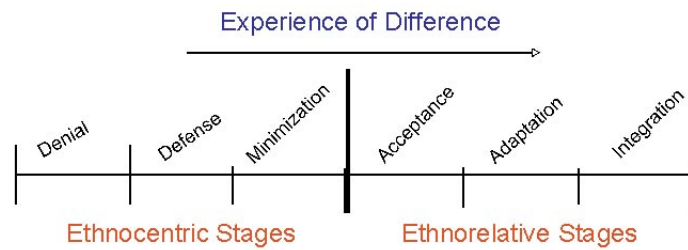
IDI

measures an individual's **orientation**
to culture differences

Intercultural competence?

the ability to communicate and behave **appropriately**
in a new culture

Milton Bennett's Developmental Model of Intercultural Sensitivity (DMIS)



Denial

- one's culture is the only real one
- unable to construe cultural difference
- aggressive ignorance
- "Munich — lots of buildings, too many cars, McDonalds"

Denial

overlooking the obvious



Defensive

- one's culture is the only good one
- "we" are superior — "they" are inferior
- highly critical of other cultures
- "We could teach these Americans a lot about being orderly."



Defense

us' versus 'them'

Minimization

- one's culture is viewed as universal and similar
- obscure deep cultural differences
- insisently nice
- "We business people are the same all over the world."

Minimization

see oneself as well-meaning



Acceptance

- one's culture is viewed as one of many complex systems
- judgment is not ethnocentric
- curious about cultural differences
- "I want to learn German so I can understand Hans better."



Acceptance

curiosity of others

Adaptation

- internalize more than one complete worldview
- empathy
- may intentionally change behavior to communicate better
- “As I was saying... Oh, salut Jean, comment vas tu?”

Adaptation

empathy



Integration

- continual shifting of different worldviews
- cross-cultural swinger
- existing on a cultural marginality
- “The unbearable lightness of being intercultural.”



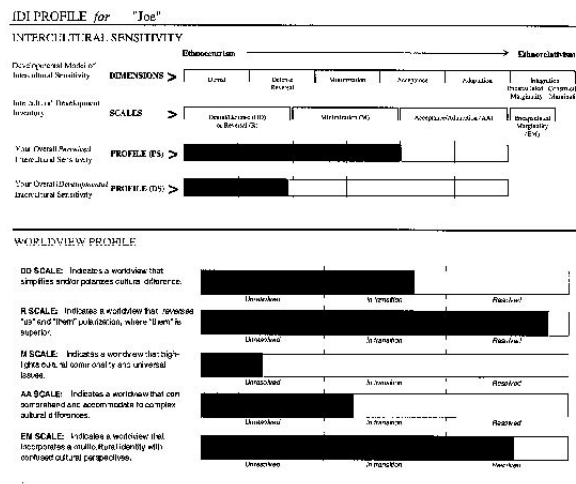
Integration

multi-frames of reference

Using IDI

- introduction — establishing intercultural context
- score 50 statements
- present IDI profile results
- self-reflection begins

- measures cognitive structures (worldview orientations)
- how we construe and organize events
- doesn't compare behaviors



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