PERFORMANCEview360
FACILITATOR'S GUIDE

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PERFORMANCEview360

Facilitator's Guide Table of Contents

About This Guide

"It takes two, to know one."

Samuel Culbert

This guide is an introduction to using **Performance View 360**. It describes the history and development of this 360 degree feedback instrument as well as important information about the interpretation of the comprehensive summary feedback report. This guide is intended for consultants and qualified users of **Performance View 360**.

WHAT THIS GUIDE CONTAINS

The guide is divided into five sections. Section I summarizes current issues in using 360 degree feedback processes. Section II provides an overview of the "COACH" model of giving feedback. Section III a background and history of the development of **Performance View 360.** Section V summarizes how to interpret the **Performance View 360** summary feedback report.

Finally, section VI provides suggestions for giving feedback with this instrument. We strongly recommend that you read each of these sections thoroughly to obtain maximum results. The Appendix Sections of the guide provides references and a sample **Performance View 360** feedback report.

Section 1

Issues in Using 360° Feedback

Performance View 360 was developed to facilitate increased competence for those in independent contributor, professional and administrative positions by providing a comparison of self and other perceptions to 14 critical competencies. **Performance View 360** is ideal for use in coaching, management development, employee development programs, career development, and succession planning interventions. It can be used either alone, or in conjunction, with other assessment tools and methods.

It seems as if just about every organization is using some type of multi-rater 360° assessment inventory (so called because feedback is collected all around the respondent and often includes perceptions from the respondent's manager, direct reports, peers, and/or customers) in their training programs, organizational development interventions, and quality efforts. By comparing one's perception with those of others, these assessment tools provide a comprehensive summary of an employee's strength and areas of development based upon specific skills, abilities, and job-related competencies.

Over the last few years, there has been a dramatic increase in the use of these types of assessments within most organizations. Why are so many coaches, consultants and HRD practitioners using these types of assessment tools? What are the reasons they have gained so much popularity? The wide use and proliferation of these types of 360° assessment instruments can be traced to several new trends and developments. Some of these include:

1. The ability of web based systems that allow data from multiple sources to be easily combined and summarized into customized feedback reports

2. The search for cost-effective alternatives to the administratively complex, yet highly valid, assessment center methodology to identify developmental areas of employees

3. Current organizational total quality management (TQM) and continuous measurable improvement (CMI) efforts that have

emphasized ongoing measurement and improvement of human, technological, and organizational systems

4. The increase of career plateauing (particularly structural and content) within all organizations resulting in employees seeking more specific and targeted job-related feedback for on-going professional growth and development, and

5. A greater concern for maximizing individual employee potential as a result of technological breakthroughs, economic and competitive challenges, changing global markets, and greater workforce diversity facing organizations throughout the 1990's.

These diverse and popular 360º assessment tools are generally used in a wide variety of human resources functions including: style and leadership awareness, supervisory training, management development, assessment centers, succession planning systems, career development counseling, training needs assessment, training and organizational development evaluation, employee coaching interventions, and personnel selection systems. However, with the popularity and development of so many different types of 360º assessment inventories on the market today, there are several important issues and concerns that practitioners should be aware of. The most critical of these 360º assessment and feedback issues include:

- Validity of self/other reports
- Sources of feedback
- What is being assessed
- Scoring procedure used
- Confidentiality/Anonymity
- Feedback results given to respondents
- Reliability/Validity of the 360º assessment tools

ISSUES OVER THE VALIDITY OF SELF/OTHER REPORTS

The main feature of 360º assessment tools is the ability to compare one's perceptions of skills, abilities, and style to those of others. But how accurate are self-reports? How do self-reports compare with the appraisal of others? What role does social desirability, impression management, and self-deception play in the validity of self-reports?

In general, current research suggests that self-ratings of skills and abilities appear to be relatively poor predictors of occupational success and performance. However, both peer and supervisory ratings of skills and potential appear to be at least as predictive of future success or performance as typical personnel selection methods and approaches including assessment centers, work-samples, simulations, and cognitive ability tests (Schmidt & Hunter, 1998). Furthermore, recent findings suggest that self-ratings of skills and performance are generally more inflated than are those of others (Nowack, 1997). As a result, self-ratings tend to be weakly associated with evaluations and appraisals from others, and this appears to be most pronounced for professional, supervisory, and managerial positions (Harris & Schaubroeck, 1988). These findings appear have strong implications for human resources practitioners using 360º assessment inventories in their training and development efforts.

First, it would appear that differences in perception might be commonly expected between respondents completing a 360º assessment tool and "others" providing the respondent with feedback. Second, it would also appear that respondents might have a tendency to be more lenient in their self-assessments of current skills, abilities, performance, and even future potential. Particularly for some respondents with poor self-insight, overly optimistic and unrealistic appraisals of one's self may have important negative repercussions for professional growth and development within an organization. For example, employees might fail to perceive or accurately interpret negative feedback from internal and external customers leading to behaviors that are largely dysfunctional or resulting in "derailment" within the organization. Similarly, employees with poor self-insight might tend to ignore discrepant, yet accurate, feedback from others and be unwilling to make specific behavioral changes in critical skills and behaviors.

In summary, current research suggests that there is a tendency for some employees to rate their skills and abilities higher than others. This "leniency effect" should be recognized and expected, particularly in employees who possess poor self-insight and self-awareness. Getting employees to acknowledge and accept critical feedback from others in a non-defensive manner is a necessary first step for commitment to change and continued professional development.

ISSUES OVER WHAT SOURCES OF FEEDBACK SHOULD BE USED

A second important issue is who should be asked to provide feedback to the respondent when using a 360^{o} assessment instrument? Obvious sources for feedback might include the employee's direct supervisor, subordinates, peers, and internal/external customers. It might be argued that all of the above feedback sources have a unique and important perspective on the respondent's skills, abilities, current performance, and future potential. However, each may not have an equal opportunity to observe all facets of how an employee performs daily on-the-job.

Should the employee's own supervisor, direct reports, peers, or internal/external customers be asked to provide feedback when using 360^{o} assessment tools? What "mix" of "others" will best provide the targeted feedback to be gathered and shared with the employee? It is important to consider who has the best opportunity to actually observe and provide feedback to the employee on a day-to-day basis.

The geographic location, organizational structure, and employee's specific job may all influence who should be included as actual feedback sources. For example, for developmental purposes it might be advised to gather as many diverse perspectives from as many feedback sources as is possible. However, when used for succession planning purposes, the employee's own supervisor may be the only practical, or desired, point of view of evaluating future success or potential.

Once the feedback sources have been identified, it is also important to decide how the specific individuals providing feedback to the employee will be actually selected. In some cases, the employee will be asked to directly select "others" who will provide them with feedback using the 360° assessment tool. In this way, employees have full control to determine who provides them with feedback. In other cases, the employee will have little or no input as the distribution and collection of the 360° assessment tool is administratively handled by the employee's supervisor, department head, or outside vendor. In this way, individuals serving as sources of feedback to complete these assessment instruments are selected without the knowledge, or approval, of the employee.

Table 1
Mean Validities of Typical Assessment Methods [1]

Selection Method	**Validity [2]**
Cognitive Ability/Intelligence	.51
Work Sample Tests	.54
Interviews (structured)	.51
Peer Ratings	.49
Job Knowledge Tests	.48
Job Tryout Procedures	.44
Interviews (unstructured)	.38
Biographical Data	.35
Personality (Conscientiousness)	.31
Reference Checks	.26
Job Experience (years)	.18
Education (years)	.10
Interests	.10
Graphology (handwriting)	.02
Age	-.01

[1]Meta-Analytic Correlations between Selection Methods and Job Performance (Schmidt & Hunter, 1998)

[2]Validity coefficients (*rho*) include corrections for sampling error and unreliability.

Closely related to what sources of feedback to include is how many "others" should provide feedback to the respondent? Of course in theory, it takes only one very accurate and objective appraisal of the employee's skills, abilities, and style to be immensely valuable and helpful! Most outside consultants and vendors offering off-the-shelf 360° assessment inventories tend to include anywhere from four to ten "others" in their administrative procedures and feedback reports. In fact, little research exists to prescribe or recommend the "ideal" number that should be included.

In summary, practitioners should carefully consider the purpose for using a 360° assessment tool before deciding what specific feedback sources should be included. The goal should be to provide employees with the most objective, comprehensive, and accurate feedback as possible. Even when carefully selected, if employees do not have faith in those providing them with feedback, they will be inclined to discount and ignore the perceptions and observations of others. The quality of the raters would appear to be much more important than either the type or number of "others" included as feedback sources when using 360° assessment tools.

ISSUES OVER WHAT SHOULD BE MEASURED

Training and development practitioners hoping to use 360° feedback tools can either develop their own to uniquely meet specific organizational needs, or purchase already existing off-the-shelf assessment inventories from a myriad of outside consultants, vendors, and training companies. In any case, an important issue is what specifically should these 360° assessment tools be measuring?

Practitioners who are using these types of assessment tools for developmental purposes should attempt to integrate them, whenever possible, with existing classroom and OJT training programs within their organizations. As such, available training needs analysis data will be helpful to delineate the specific knowledge, skills, and abilities (KSAs) that should be targeted in the development or purchase of an off-the-shelf 360° assessment inventory. In this way, employees will receive feedback on the job-relevant knowledge and skills that are already being targeted in existing training and organizational development interventions.

Where it is not practical to design and develop a customized 360° assessment tool, practitioners will be forced to identify and select the best off-the-shelf instrument that most closely matches their organizational needs. It is important to note that the majority of the off-the-shelf 360°

assessment inventories available from outside consultants and vendors are generally based on very diverse theoretical and conceptual models. Furthermore, they often measure very different skills, abilities, and competencies. However, most can be described as being designed and developed based on five different models resulting in a unique set of KSAs that are typically measured. These models can be described as the:

- **Job Analysis Model**--the KSAs measured in these 360^o assessment tools are based on traditional job analysis procedures. Use of interviews, focus groups, and job task information questionnaires typically result in a list of KSAs targeted to a specific position and measured by the 360^o assessment tool.

- **Competency Based Model**--the KSAs measured in these 360^o assessment tools are not on aspects of the job, but of those that perform the job best (i.e., competencies). True competencies are identified by comparing and contrasting the differences between a group of "high performers" and "low performers" within the organization. These differences, or competencies, are then assessed directly by the 360^o assessment tool.

- **Strategic Planning Model**--the KSAs measured in these 360^o assessment tools are based on the strategic plan of the organization and the critical knowledge and skills required for future success. Again, interviews and focus groups with key senior executives and managers results in a list of "strategic KSAs" that support the implementation and achievement of the operational and strategic plans of the organization. The 360^o assessment tool is specifically designed to assess and measure these particular "strategic KSAs."

- **Developmental Theory Model**--the KSAs measured in these 360^o assessment tools are based on theories and/or conceptual models about how employees grow and develop. These theory-based models prescribe specific KSAs that are important at various stages of professional growth and adult development.

- **Personality Theory Model**--the KSAs measured in these 360^o assessment tools are based on a specific personality-based models of effective interpersonal relations, leadership, or organizational success. These personality-based assessment instruments typically assess particular individual qualities, traits, temperaments, or styles (e.g., communication, leadership, interpersonal, cognitive).

In summary, practitioners using 360° assessment feedback instruments should identify the key knowledge and skills to be measured, and either develop or purchase an existing assessment tool that best meets their organizational needs. It is important to keep in mind that the diverse off-the-shelf assessment tools are not necessarily measuring the same set of KSAs, or are even based upon the same theoretical or conceptual models. Particularly in the case of off-the-shelf 360° assessment instruments, practitioners should carefully compare one instrument to the other to insure that like-named scales are defined the same way and essentially measuring what they purport to be measuring.

ISSUES OVER WHAT SCORING PROCEDURES SHOULD BE USED

Another important issue in the use of 360° assessment tools concerns what scoring procedure is most appropriate. In other words, whom should the employee's score on a specific scale on a 360° assessment inventory be compared to? In practice, the employee could be compared to himself/herself (ipsative scoring) or to a representative sample of "like employees" (normative scoring).

Arguably, the most powerful and effective use of 360° assessment inventories is when they are administered to the same employee over at least two different periods of time. In this way, continuous measurement of relevant KSAs can occur allowing the employee to track and monitor specific performance and behavioral changes over time. As such, the employee's initial scores serve as the "baseline" measure against with future change and improvement can be compared. Thus, the frame of reference in ipsative scoring is the individual, rather than, a representative normative sample.

The emphasis of an ipsative scoring procedure is solely on the individual and how he/she changes over time based on the feedback from others. It is important to note that certain personality-based 360° assessment tools are more concerned about increasing awareness about one's interpersonal, communication, or leadership style at one point in time, rather than, focusing on how they may change over time. Nonetheless, people do change and by periodically comparing one's perception with those of others, individuals may gain new insight about their temperament and styles.

In contrast, normative scoring allows the employee to compare his/her scores with those of a representative group of "like employees" within a specific job classification, industry type, or organization. In general, three different types of norms are used with 360° feedback tools:

- Industry or Job classification norms
- Organization specific norms
- Competency based norms

Many vendors and companies offering off-the-shelf 360° assessment inventories commonly maintain industry-wide (e.g., health care, finance, aerospace) and job classification specific (e.g., first-line supervisor, executive) norms that are used for scoring and feedback report purposes. Practitioners should make sure that they are using the most relevant and representative norms available, and that they accurately reflect the industry and/or target job intended. Otherwise, feedback from these instruments may be difficult to interpret or of little relevance to the respondent.

It can be argued that organization specific norms may be more meaningful than industry-wide norms for interpreting the results of most 360° assessment tools. Organization specific norms allow for direct comparisons between employees within the same organizational culture and climate. Practitioners should make sure that a large and representative sample is initially used to adequately determine one's own organizational norms. One major advantage of using one's own organization as a normative base of comparison is that it allows practitioners to identify specific training needs across the each of the KSAs being measured by the 360° assessment tool.

Competency-based norms are another scoring alternative that are based on one's own organization. Competency based norms are established by first identifying a fairly large and representative sample of "high performer" or "high potential" employees from within the organization. They are administered the 360° assessment inventory and the results from this group are statistically analyzed to calculate individual scale means and standard deviations. These means become the "competency means" that are to be used for all subsequent employees who will be administered the same 360° assessment inventory. In this way, the remaining employees are being compared to the "high performers" or "high potentials" within the organization. Developmental efforts, based upon the results of these 360° assessment inventories, will be targeted towards the very behaviors that differentiate between these high and lower performers.

In summary, practitioners using 360° assessment inventories should decide upon the most relevant and appropriate scoring procedure to be used. Either ipsative (comparison between the same employee's scores over time) or normative (comparison between different employees) should be used. When normative scoring is used, practitioners should attempt to insure that the normative sample being used is representative of the employee group being administered the 360° assessment inventory. When practical, competency-based norming allows employees to be compared to "high performers" within their own unique organizational culture.

ISSUES IN CONFIDENTIALITY/ANONYMITY

Several issues exist with respect to confidentiality and anonymity in the use of 360° assessment tools. When using any assessment instrument or organizational survey, it is important to insure that participation is voluntary, and either anonymous or confidential in nature. Employees that feel coerced into participating, or who feel that they will be identified in the feedback report, may comply but provide incomplete or biased feedback.

Practitioners using 360° assessment inventories should decide whether the individuals providing feedback to the employee (e.g., supervisor, subordinates, peers, customers) should be identified or remain completely anonymous during the administration and feedback reporting process. Most outside consultants and vendors offering these off-the-shelf 360° assessment inventories will provide as much anonymity as you wish in this regard. Some vendors marketing these types of instruments will generate computerized feedback reports that explicitly delineate the specific feedback sources included whereas other vendors will only identify these feedback sources as "others" maintaining their anonymity.

In summary, practitioners must weigh the advantage of identifying the feedback sources to the employee (i.e., enabling the employee to directly compare his/her perceptions of skills or behavior with those of others) against the disadvantage of potentially having "others" hesitant to be completely honest and objective in their feedback if they can be identified. In any case, practitioners should communicate clearly to all employees and feedback sources whether administration and results of the 360° assessment inventory will be treated in a completely confidential or anonymous manner.

ISSUES SURROUNDING FEEDBACK RESULTS

Two important issues around feedback exist with respect to those utilizing 360° assessment inventories:

1. To whom should the summary results be given, and

2. Should scores from the feedback sources be reported separately or pooled together reflecting an average score in the results?

If the 360° assessment inventory is used primarily for training purposes, oral or written results are typically given directly to the employee for his/her use. Employees are often encouraged to share their summary feedback with their own supervisor to facilitate developmental planning efforts. On the other hand, information from the summary feedback report is often, but not always, shared directly with the respondent's supervisor (or other members of management) when the 360° assessment inventory is utilized in interventions other than training (e.g., succession planning systems, assessment center programs). Practitioners should clearly communicate to the respondent, as well as all feedback sources, to whom oral or written feedback will be given. Care must be taken to insure either anonymity or confidentiality depending on the nature and purpose of the 360° assessment inventory used.

Another issue related to feedback with 360° assessment concerns how the results from the feedback sources should be summarized. One approach is to provide a composite "pooling" of all feedback sources on each competency area assessed, in effect creating an average or "pooled" summary. This approach has the strength of controlling for "outliers" or single individuals who might be overly critical or complimentary. However, the salience of individual perceptions may be lost as the scores are averaged, minimizing any true divergence that exists between raters.

A second approach is to avoid any "pooling" or averaging of scores from the "others" providing feedback on the 360° assessment inventory. In this approach each individual providing feedback on the critical competencies is summarized independently of each other allowing for a direct comparison between self and "other" ratings. In this approach, raters expressing either a "halo" or "horn" bias will be clearly shown. However, without "pooling" observations, it is harder to interpret the meaning when divergence exists between raters (e.g., when divergence exists between raters).

In summary, practitioners using 360° assessment inventories must clarify both the type (oral, written) and direction (respondent only, respondent and supervisor, supervisor only) of the feedback results that are given. Practitioners should also be aware of how the feedback from others will be analyzed and summarized ("pooled" ratings or individual ratings).

ISSUES OVER THE RELIABILITY/VALIDITY OF THE 360° ASSESSMENT INVENTORIES

Whether you decide to develop your own or purchase an off-the-shelf 360° assessment inventory, they should have all the important psychometric properties of well established and accepted paper-and-pencil instruments including reliability and validity. Although there are many different types of reliability and validity, practitioners should attempt to minimally determine and establish the following:

- Reliability
  - Test re-test (consistency over time)
  - Scale (internal consistency of the scales being measured)

- Validity

    - Face (respondent's reaction and acceptance of the instrument)

    - Content (job-relatedness of the questions being asked and scales that are measured)

    - Criterion-related (association between the scales and diverse performance criterion)

Practitioners who choose to develop their own 360° assessment tool should utilize a small group of representative employees to determine whether the scales that compose the instrument have adequate reliability and validity. Outside vendors marketing these instruments should have information available about the development, reliability, and validity in the form of validity manuals and published research studies for you to review.

In summary, practitioners must insure that the 360° assessment inventory being utilized has adequate reliability and validity. It is important to understand that there are many different types of reliability and validity. Each tells you something different about the usefulness and strength of the instrument. Don't be misled when someone tells you the instrument has been "validated." Be sure to ask what type of validity the individual is referring to and how they arrived at this conclusion.

Assessment instruments that provide for 360° feedback can be powerful tools for a wide variety of training and organizational development interventions. Practitioners considering their use should carefully consider the seven issues related to their development, administration, scoring, and feedback presented above. When properly utilized, 360° assessment inventories allow employees the unique opportunity to compare perceptions of their own skills, abilities, and style with those of others in an objective and honest manner. When employees can openly acknowledge and accept how they are viewed by others, they are better able to make the necessary changes to improve specific behaviors and overall performance.

Section 2

Using a 360° Feedback Process for Development: Introduction to the "COACH Model"

You just got a call from the Vice President of Human Resources. She is asking you to work with a member of senior management who reportedly has been experiencing some recent performance problems. This person has been a long-tenured employee who has progressed up the managerial ladder after having spent many years in a technical specialist career track. He is from the "old school," and typically uses a "command and control" approach to leadership and employee motivation. This style is becoming somewhat out of step with the new trends in your organization which emphasize customer service, collaborative teamwork, and participative approaches to problem-solving and decision making. You have been asked to design and implement an individualized coaching process to help the individual better understand how he is being perceived, and what impact his leadership and communication style has on others. It is hoped that this process will culminate in a specific executive development plan targeting critical competencies required for success in the current organizational culture.

You wonder what to do first. You would like to respond to this request and provide assistance in a manner that will benefit the manager as well as the people reporting to him and others who may feel the effects of his management style. On the other hand, this is a real challenge, and you realize you need to consider the pitfalls, too. If you can structure and deliver an appropriate intervention, and if the manager can rise to the challenge and successfully implement the resulting plan, it could be a "win-win" for all concerned.

It is important to think carefully about how to structure a coaching intervention to maximize its chances of success. When properly designed, individualized coaching can be an effective process to help executives and managers better understand and clarify specific strengths and development areas, and then take action to address those needs. Executive or managerial coaching can be particularly challenging even for the most seasoned training and development professional. When done well, these approaches to coaching can yield dramatically positive results for both the individual and the organization.

Although traditionally used for performance improvement, frequently organizations are incorporating coaching processes in executive and management development, succession planning and career counseling programs. Whatever the context, a coaching process presents specific challenges and issues that must be addressed to ensure success. On the one hand, using a structured and systematic approach to individualized coaching gives focus and maximizes the chances that the intervention will be successful. On the other hand, it is essential that the process retain enough flexibility to address specific individual and organizational needs that may emerge as the process takes place.

This section describes a four-step method, the "COACH" process, which provides a structured approach to individualized executive and management development. It contains recommendations for issues to address before, during and after a coaching intervention. The "COACH" process consists of four specific steps. Each step is designed to provide a "roadmap" for how to address critical issues and questions at that stage in the process. The "COACH" process consists of the following steps:

1. Contract

2. Observe and Assess

3. Constructively challenge

4. Handle Resistance

To start, the coach/consultant, the individual receiving coaching, and possibly other relevant parties make a <u>contract</u> or a set of agreements so that each knows what the objectives are, who is responsible for doing what, and how success will be evaluated. Then, the consultant will <u>observe</u> and <u>assess</u> the individual to determine their strengths and areas for improvement, which later will form the basis of an action plan. Next, the consultant will <u>constructively challenge</u> the person in a way that is both supportive and compelling so that the individual can understand the issues and be prepared to address them. Finally, the consultant will need to handle resistance that a person is likely to exhibit whenever they are confronted with discrepant information or challenged to make important changes in their behavior.

Below each step in the coaching process is described briefly, along with guidelines that can help a coach/consultant successfully implement it.

Step 1: Contract

The key to a successful executive and managerial coaching intervention starts with the initial step of the "COACH" process--Contracting. The idea of a contract is similar to the legal term: a set of clear, workable agreements. Careful contracting will facilitate clarity in defining the coaching goals, methods and outcomes. Too many coaching interventions fail or are less than effective simply because there was poor or insufficient contracting.

As with any other consulting intervention, poor contracting up front in an executive or managerial coaching process may end up doing more harm than good. Careful contracting enables people to know what they are getting into, and it can help minimize anxiousness, resistance and anger (which to some extent are inevitable).

To begin the contracting process, the training and development consultant needs to determine who is the client (which is not always as obvious as it may seem), who the other relevant parties are, and what are the major needs and wants of each. (It is important not to neglect one's own needs and wants. After all, the consultant has some ideas as to what in their professional view are the conditions necessary for good outcomes.)

Next, it is the consultant's responsibility to make sure that people understand and agree on the major terms of the contract. When in doubt, DON'T ASSUME ANYTHING! It is better to risk annoying people by stating and restating the obvious than simply to hope people are holding the same assumptions

The consultant's job in this stage is to help people identify the relevant foreseeable issues, and make sure they are adequately discussed and agreed upon. Throughout the process, one may need to work hard to maintain the mutually agreed upon contract. Regardless of the clarity of the contract, people sometimes can remember points differently or try to change them throughout the course of the intervention.

A "fuzzy" contract--one in which people reach vague pseudo-agreements because they do not wish to face up to difficult issues--can spell trouble ahead. If, in the consultant's opinion, the contract is not workable, it is best to turn down the assignment rather than take it on and hope that things will change. Sometimes, political considerations may weigh against negotiating too forcefully, and it may be best to recommend an external consultant if the political climate makes it too difficult to proceed safely.

Any executive and managerial coaching process requires definition and clarity around the following key contracting issues summarized below. It is recommended that the training and development consultant initiating an individual coaching assignment thoroughly define and gain mutual agreement on the following contracting questions:

- Who is the client in the coaching intervention? (Is it the individual to receive coaching? their manager? Human Resources? Other key executives who may have a stake in the outcome?)
- What is the project definition, the parameters, or the scope of the project?
- What are the purposes and intended outcomes of the coaching intervention? (both stated and unstated)
- What involvement, if any, will there be of other individuals in the client system (e.g., the client's manager or Human Resources)?
- Who "owns" the intervention? (Who is accountable for what activities or outcomes?)
- How will the need for the coaching intervention be communicated to the individual?
- Who will receive feedback from the coaching process?
- How will the feedback be delivered, and in what form?

- How will the coaching intervention be monitored and evaluated?

- What follow-up will be built into the process (e.g., subsequent use of a 360° feedback instrument 6 -12 months later)?

- How will the results of this coaching intervention be translated into an individualized development plan?

- How will the data, results and findings of the coaching intervention be used (e.g., integrated into the performance management succession planning system)?

Step 2: Observe and Assess

Once the majority of issues and concerns of the contracting step has been clarified, the "COACH" process emphasizes the design and implementation of a carefully planned methodology to observe the individual and assess their strengths and development areas. The training and development consultant needs to design a comprehensive approach to observe and assess the critical competencies being targeted in the coaching intervention.

In selecting an approach to observation and assessment, it is important to tailor it the specific needs of the individual and the organization. When possible, it is desirable to employ multiple assessment approaches targeted to critical skills and competencies required for organizational success.

The foundation of a successful coaching intervention begins with clarity around the specific competencies being targeted. The areas most commonly evaluated during executive and managerial interventions include:

1. Communication (e.g., listening, meeting management, high impact presentations)

2. Interpersonal (e.g., Negotiation, Conflict management)

3. Task Management (e.g., delegation, team development, performance management)

4. Problem--Solving/Decision Making (e.g., strategic and long-range planning, judgment); and

5. Self Management (e.g., stress resistance, managerial career orientation). A job profile analysis can assist the training and development consultant to define the specific competencies to be targeted.

Ideally, the job profile analysis should include a review of the departmental organizational strategic plan to identify major competencies required for future performance as well as a traditional review of competencies needed to perform successfully in the person's current job.

When selecting assessment tools and methods, it is best first to decide on the relevant competencies, and then select the tools that are most appropriate for measuring them. A wide variety of assessment instruments and tools are available to measure: 1) critical skills and knowledge; 2) personality/style; and 3) career orientation, interests and values. These can include paper-and-pencil instruments, behavioral exercises, role-plays, simulations, leaderless group exercises, or an integrated approach that combines a number of these approaches. Training and development consultants should be careful not to fall into the trap of using only those techniques with which they are familiar and comfortable.

Knowledge might be assessed appropriately using situational interviews, simulations and work sample tests specifically designed for the coaching intervention. Skills are best assessed using either multi-rater 360° feedback processes (instruments and/or interviews) or through assessment center methods such as an in-basket simulation and other work sample tests.

Feedback about personality and style (leadership, communication and interpersonal) likewise can be ascertained through the use of multi-rater 360° feedback processes. Also, a wide variety of off-the-shelf instruments can be used for gaining insight about personality and style. Diverse "style" measures are used often for teambuilding purposes. These popular organizational "marriage counseling" tools can be quite helpful to executives and managers for becoming more aware of how others view their leadership and interpersonal style and the impact they have on direct reports, team members and customers. Also, the newer generation 5-factor personality inventories might be considered to provide a comprehensive overview of the individual and their tendencies to approach organizational and interpersonal challenges.

It also may be helpful to gather information about the career orientation, interests, and values of the individual. This can be accomplished through the use of a structured interview process and/or career assessment instruments.

Sometimes in executive and managerial coaching interventions, it becomes necessary to make a referral to outside resources (e.g., therapists, alcohol and substance recovery programs, family counselors) for help with personal or lifestyle issues that could be interfering with job performance. A computerized health risk appraisal and complete medical checkup may also be desirable or necessary.

Careful consideration of the methods and approaches used to observe and assess the individual during a coaching process is essential to the success of an intervention. The following issues and questions should be addressed when selecting assessment methods:

- What critical dimensions/competencies will be targeted?
- What specific assessment methods/instruments will be used to measure these key competencies?
- Who will provide data on the relevant competencies being measured (e.g., peers, direct reports, customers, the person's manager, etc.)?
- How can one set a context so that data can be collected in a manner that will yield the most accurate results?
- Who will provide the feedback, and how will it be delivered?
- To what extent will confidentiality be maintained throughout the feedback process, and how can this be ensured?
- How will the results be assembled and summarized to provide maximum clarity about the person's strengths and development areas?

Step 3: Constructively Challenge

The third step in the "COACH" process involves constructively challenging the person with the information collected in the observation and assessment phase of the intervention. The data need to be summarized and delivered to the person in way that helps them understand and accept it without becoming overly or unnecessarily defensive. Otherwise, the best contracting efforts and measurement methods may be of little value in assisting the person to improve targeted performance behaviors.

In this feedback step, the consultant must provide the information in a succinct and behaviorally oriented manner using both oral and written feedback. If separate computerized feedback reports are given, it is advisable to prepare a final summary assessment report to focus developmental efforts. The consultant needs to maintain confidentiality and provide non-evaluative observations and comments about specific competencies being targeted in the coaching process. It is important to be careful not to label or make predictions about future success or failure based upon the assessment results.

One important issue to consider is whether the person has a realistic impression of their strengths and development areas. It is very common to discover that many executives and managers typically have unrealistic views of their skill level (e.g., "over-estimators" or "under-estimators").

Over-estimators typically rate themselves higher than others rate them, and often become defensive when receiving feedback. The training and development consultant must actively listen, focus feedback on specific behavior and avoid describing personality or attitude traits. The art is to share information in a way that provides specific examples, yet does not compromise confidentiality. That way, the person can get a good handle on what specifically they are doing that produces negative reactions in others.

For those who underestimate their strengths, it is important to expect that they may be lacking in self-esteem or confidence. The training and development consultant should provide as many examples and critical incidents of successful interactions, high performance outcomes and project successes to enable the person to modify their self-image in a more accurate, positive direction. Often, "under-estimators" are more fearful of failure than they are of success on the job. As a result, they may tend to be a perfectionist and self-critical, and thus have a deflated view of their skills.

The following issues and questions should be addressed during this step of the coaching process:

- How will the feedback/data best be presented to facilitate acceptance and understanding?
- How does one balance confrontation and support?
- If feedback is to be shared with the person's manager or others, how can one do it in a manner that allows the individual to retain dignity and an appropriate degree of control?
- What is the best balance of quantitative and qualitative data to be presented?
- What special considerations should be given to delivering feedback to people whose self-evaluation is either in agreement with or discrepant from feedback from others?
- How can feedback be given most constructively to an "over-estimator?"
- How can feedback be given most constructively to an "under-estimator?"
- How should the feedback be paced so the person can assimilate the array of issues, yet be able to focus on a few that are of greatest importance?

Step 4: Handle Resistance

In almost all executive and managerial coaching processes, some amount of resistance to the process or to specific feedback will be expressed. The training and development consultant should be prepared to experience and effectively handle the person's anger, frustration, and direct or indirect challenges.

People who lack self-insight about their areas for improvement (e.g., over-estimators) typically display the most resistance and denial. The way one identifies and handles resistance is critical for the coaching process to be effective. The training and development consultant must work hard to understand the person's feelings, especially their fears and anxieties which they may not feel comfortable acknowledging. This requires a high degree of support, active listening and probing to uncover the source of the resistance to the process or to specific feedback from others. It is important to recognize that when people are resistant, they are unlikely to accept the feedback as valid--let alone become committed to making behavioral changes.

For many consultants, handling resistance can be especially challenging. It is natural to feel that after one's hard work in the earlier stages, people should appreciate your efforts and willingly go along with your recommendations and do their part. Because of this, consultants sometimes may miss subtle signs of resistance. With experience, however, it is possible to develop a thick skin and learn not to take resistance personally. If the consultant truly is comfortable with someone expressing their resistance, it becomes easier to help them identify and deal with their feelings. This paves the way for the person to do the hard work of addressing behavioral change.

The following issues and questions should be addressed during this last step of the coaching process:

- How can resistance be spotted--whether overt or subtle.
- How will defensiveness, denial or anger be handled effectively?
- How will anxiety and/or low self-esteem be handled effectively?
- How will the coaching process be translated into a specific action plan that truly addresses the person's issues (rather than going through the motions so the person can appear to comply)?
- How will progress against the individual development plan be monitored and evaluated?
- What process will be used to follow-up with the person?

- What type of resistance is the consultant most vulnerable to, and how can one avoid getting "hooked?"

- How can the consultant distinguish between resistance that is "just" resistance versus valid criticism of the process or the feedback?

Executive and managerial coaching assignments can be among the most challenging and high impact interventions. They truly can make a difference to the individual receiving coaching, to those who work with them, and ultimately to effectiveness of the unit or the organization. The "COACH" process of contracting, observing & assessing, constructively challenging and handling resistance can be used to walk through the key steps required to avoid typical problems encountered in most coaching interventions.

To become proficient in the coaching process, it is helpful to follow carefully each of the steps in the "COACH" process and pay attention to the issues raised throughout. But this may not be enough. It also is important to seek and be receptive to feedback about one's own role as a coach. After all, the essence of coaching is helping others deal with feedback. And, who are we to preach that feedback applies only to others and not ourselves?

Section 3

History & Development of the Performance View 360

Performance View 360 was first designed and developed in early 1985 by Kenneth M. Nowack, Ph.D. and is based on **Manager View 360** which was derived from extensive job analysis of supervisory and managerial positions in several large service, manufacturing, and aerospace companies. The job analysis for **Manager View 360** included incumbents who were interviewed regarding the major job tasks associated with their positions. A comprehensive job-task activity questionnaire was constructed that summarized both the importance and frequency of each job tasks relative to the targeted supervisory and management positions.

The job-task questionnaires were distributed to incumbents and statistically analyzed. A set of critical supervisory and managerial dimensions were derived in four specific areas: 1) Interpersonal; 2) Communication; 3) Administration; and 4) Decision-Making. Items were rationally constructed to measure the full range of supervisory and management skills in these four areas. Twenty scales were derived, each measured by four questions.

An initial version was piloted with a group of 85 existing supervisors and managers within two organizations. Statistical analyses included item-scale correlations, breakdowns by relevant demographic variables (e.g., education, age, gender), internal consistency reliability, and descriptive (scale means, standard deviations, etc.) were run to investigate the psychometric properties of the instrument. Based upon the results of the pilot testing and statistical analysis, some revision in item content and wording was done resulting in the copyrighted 1994 100-item version.

A total of eight key supervisory and management competencies in **Manager View 360** were deleted to create a new tool, **Performance View 360**, suitable for independent contributors, specialists, technical experts and administrative staff who did not have any supervisory responsibilities. Three new competencies were added based on additional job analyses of non-supervisory employees in the same companies used for the development of **Manager View 360** as described above:

- Project Management (Task Management)
- Collaboration (Interpersonal)
- Team Support (Interpersonal)

PERFORMANCE VIEW 360 FEEDBACK COMPETENCIES

COMMUNICATION SKILLS

LISTENING: Ability to be attentive and understand the verbal communications of others.

TWO-WAY FEEDBACK: Ability to keep others informed in a timely manner.

WRITTEN COMMUNICATION: Ability to express written thoughts and ideas in a clear and concise manner.

ORAL COMMUNICATION: Ability to convey oral thoughts & ideas in a clear and concise manner.

ORAL PRESENTATION: Ability to present individual and organizational viewpoints to groups in a clear and persuasive manner.

TASK MANAGEMENT SKILLS

PLANNING/ORGANIZING: The ability to set realistic and measurable goals and allocate resources (people, budget, materials, etc.).

PROJECT MANAGEMENT: The ability to effectively utilize available resources to complete projects, tasks and assignments in a timely fashion with quality.

STRATEGIC PROBLEM ANALYSIS: Ability to analyze a situation, identify alternative solutions, and develop specific actions.

DECISIVENESS/JUDGMENT: Ability and willingness to make high quality decisions when required.

INTERPERSONAL SKILLS

TEAM BUILDING/DEVELOPMENT: Ability to create and develop motivated, cohesive, and high performance teams.

SENSITIVITY/DIVERSITY: Ability to take actions that demonstrate consideration for the feelings and needs of others.

NEGOTIATION/CONFLICT MANAGEMENT: Ability to negotiate and effectively resolve interpersonal differences with others.

COACHING/DEVELOPMENT: Ability to coach, train, and develop others.

LEADERSHIP/INFLUENCE: Ability to utilize appropriate interpersonal styles and approaches in facilitating a group towards task achievement.

EMPLOYEE INVOLVEMENT/PARTICIPATION: Ability to involve employees in organizational planning, decision making, and problem solving processes.

INTERCORRELATIONS BETWEEN PERFORMANCE VIEW 360 SCALES

Statistical analyses were conducted to determine the relationship among the **Performance View 360** scales (N=996). Pearson correlation coefficients were calculated between the 14. These correlations ranged from .37 to .84 (all p's < .01). These Intercorrelations suggest that the scales are only modestly independent of each other. In general, respondents who score high on one scale might also tend to score high on some of the other **Performance View 360** scales.

PERFORMANCE VIEW 360 NORMS

Norms for the **Performance View 360** have been established with over 6,500 full-time working professionals in diverse private, public and not-for-profit industries including: pharmaceutical/medical, accounting, government, non-profit, health, technology services, professional, customer and health services, education, entertainment, communications, production, biotech, computer, retail, engineering, health care, manufacturing, banking, finance, insurance and aerospace/defense.

The current normative sample consists of employees that are primarily male (40.1%) with 14.9% between 18 and 29 years of age, 29.3% between 30 and 39, 30.8%% between of 40 and 49, 21.0% between 50 and 59 and 4.0% 60 or older. This sample is relatively well educated (12.4% with a high school diploma, 46.0% with a Bachelors, 38.6%% with an advanced degree) and ethnically diverse (24.4% Asian, 5.3% African American, 59.5% Caucasian, 2.0% Hispanic, and 8.0% undisclosed or other).

The majority of the participants in the **Performance View 360** database (92.6% are rated by others as Outstanding, “Very Effective” or “Effective” in their current overall performance and 81.1% were rated “very high” or “high” overall potential for further advancement within the organization (2.3% were rated “low” or “very low” and 16.7% were rated “moderate”). Raters were also asked to rate the individual's risk of experiencing career difficulty within this organization as a result of factors and behaviors under his/her control. Only 4.0% of the participants were rated as “very high” or “high risks” of possibly derailing or having career challenges.

PERFORMANCE VIEW 360
RELIABILITY & VALIDITY

Internal consistency reliability (Cronbach's alpha) was calculated for each of the twenty **Performance View/360** scales. These moderately high coefficients range from .70 to .90 establishing the reliability of the instrument. The average test re-test reliability over a 3-month period across all 14 scales is .66.

Performance View 360 Competency	Mean	SD	Reliability
Communication			
Listening	28.00	4.45	.84
Two-Way Feedback	28.55	4.80	.76
Written Communication	28.20	4.95	.90
Oral Communication	28.55	4.45	.82
Oral Presentation	27.90	4.55	.73
Task/Project Management			
Planning/Organizing	28.55	4.80	.70
Project Management	29.10	4.80	.82
Strategic Problem Solving	28.10	4.70	.78
Decisiveness/Judgment	28.45	4.35	.80
Interpersonal			
Collaboration	29.35	4.50	.80
Interpersonal Sensitivity	29.45	4.90	.87
Negotiation/Conflict Management	27.80	4.80	.81
Team Support	28.40	4.65	.80
Leadership/Influence	27.65	5.00	.80

Section 4

Interpreting the Performance View 360 Summary Feedback Report

The **Performance View 360 (PV360)** feedback report is divided into several sections. Each section will be briefly discussed to assist with the interpretation of the summary feedback report.

- Performance View 360 Cover page
- Introduction/Rater Summary page
- Self/Other Awareness View Summary (Optional Section)
- Performance View 360 Competencies
- Performance View 360 Graphs
- Most Frequent/Least Frequent Behaviors
- Overall Item Summary/Rater Agreement Index
- Open-Ended Questions: Strengths/Development Areas
- Performance View 360 Developmental Action Plan Worksheet

Performance View 360 Cover Page

The **Performance View 360** is intended for organizational coaching, leadership development and employee training purposes, rather than, personnel selection decisions. The cover page of the PV360 summary feedback report provides an important paragraph that qualifies the use of this instrument:

> *"The Performance View 360 report is designed to provide a focus about managerial competency strengths and potential development areas. It should not be used as a source of information concerning personnel actions including promotion, salary, review or termination."*

The **Performance View 360** cover will also provide the name of the client, company name, date of administration and the customized logo of the consultant using this instrument.

Introduction/Rater Summary Information

The **Performance View 360** introduction section provides an overview of the instrument and summarizes the type and number of raters in a table. It is important to keep in mind that the administration system used to generate the feedback report can be completely customized to allow for any rater labels that are requested by consultants or his/her clients. These customized rater labels will appear in this section along with the number of raters who have successfully completed the online questionnaires.

This section also provides a very brief outline of the sections of the **Performance View 360** feedback report as well as information about the conceptual model that this instrument is based upon. It reminds the participant that the PV360 instrument utilizes a frequency rating scale of observed behaviors (1 to 7 scale, where 1=Extremely Low Extent and 7=Extremely High Extent).

Performance View 360 Competencies

The **Performance View 360** performance factor areas are defined and categorized in this section including:

1. Communication
2. Task Management
3. Interpersonal

Self/Other Awareness View Summary

A key feature of **Performance View 360** is the self-awareness and social awareness view summary section. This section provides feedback, in the form of graphs, about the level of self and social awareness by comparing average self report ratings to those of others across the 20 PV360 competencies.

Self/Other awareness in the PV360 can be categorized in four distinct ways:

1. Potential Strengths (Low Self-ratings and High Other ratings)
2. Confirmed Strengths (High Self-ratings and High Other ratings)
3. Potential Development Areas (High Self-ratings and Low Other ratings)
4. Confirmed Development Areas (Low Self-Ratings and Low Other ratings)

Respondents are asked to examine which specific emotional intelligence competencies fall into each of these four categories. Respondents are encouraged to leverage those categorized as Confirmed/Potential Strengths and possibly consider ways to enhance skills and effectiveness in those categorized as Confirmed/Potential Development Areas.

A series of graphs (see example in the Appendix) are provided to summarize this self-awareness/social awareness perspective based on the type of rater categories used during the administration of the instrument. Typically, the respondent will be provided the following types of comparisons:

- Self-Manager Comparisons
- Self-Peer Comparisons
- Self-Others Comparisons

Each comparison will provide a summary of self ratings and "other" ratings on the right column of the graphs categorized along these four strengths and development area quadrants. Take a look at the sample report shown in the Appendix section to review which competencies fall into each of these four quadrants.

The quadrant called *Potential Development Areas* might be described as "blind spots" for the respondent and worth further exploration. The respondent appears to be an "over estimator" in these eight critical PV360 competencies. Current research suggests that this quadrant might be most closely associated with areas of potential "derailment" or failure due to poor self-awareness or self-insight. It is hypothesized that respondents with poor emotional intelligence, measured by inaccurate self-ratings, might be most vulnerable to failure. It is important to identify both the number and type of competencies identified in this quadrant since they reflect strong overestimations of skill and ability on the part of the respondent.

In sample report provided in the Appendix, it is also possible to identify several competencies labeled as *Confirmed Strengths* in the upper left hand corner quadrant for all rater groups. These competencies are ones both rated high by the respondent and his/her manager and ones that should be leveraged further as recognized assets. Respondents with a large number of competencies falling in this quadrant might be seen as possessing accurate self insight and self awareness (high emotional intelligence). It is also important to note the type of competencies that fall into this quadrant—if there is a preponderance of competencies in the *Relationship Management* area (e.g., Sensitivity, Collaboration, Conflict Management) it might suggest further exploration of specific social and interpersonally focused behaviors that might potentially hinder success on the job.

Self-Other Graphs

A series of line or bar graphs will compare self and other perceptions on each of the twenty competencies measured in **Performance View 360**. These graphs may utilize either average scores or normative scores (t-scores or z-scores) depending on what has been selected by the coach, consultant or organization using the instrument. A minimum number of raters (typically 2 or more) will be required before data will be graphically shown (referred to as "AP" for anonymity protection.

Interpreting Self-Ratings

A good place to start looking for patterns when interpreting **Performance View 360** results is to look at a person's self-ratings. Many patterns are possible, but there are several important things to look for.

First, how do the person's self-perceptions compare to the self-ratings of other people in the **Performance View 360** normative database (or relative to the other raters)? You will find that some people rate themselves as consistently practicing specific **Performance View 360** skills more frequently than others in our database.

Keep in mind that when people rate themselves, they do not know whether they are rating themselves higher or lower than anyone else. They merely assign themselves a frequency rating on a seven-point scale. However, when the person's ratings are plotted on a **Performance View 360** graph it shows directly how the person's ratings compare to those of others.

Generally, it is more important to know whether a person's self-rating is higher or low compared to the average self-rating than it is to know that a person's score is 5.6 on a seven-point scale. Although such a score is on the high side of the seven-point scale, it could be lower than the average self-rating. If that is the case, it is misleading to conclude that the person sees himself or herself as particularly effective on that **Performance View 360** scale.

In interpreting self-ratings, most profiles can be characterized into the following categories:

- **High ratings across all or most of the Performance View 360 scales**. All or most of the person's self-ratings fall above the 0.0 z-score line (above 50 on a t-score) on the **Performance View 360** feedback graphic summary. The person sees himself or herself as more frequently practicing the supervisory and management practices measured by the **Performance View 360**

- **Low rating across all or most of the Manager View360 scales**. All or most of the person's self-ratings fall below the 0.0 z-score line (below 50 on a t-score) on the **Manager View360** feedback graphic summary. The person sees himself or herself as less frequently practicing the supervisory and management practices measured by the **Manager View360**

- **High and low ratings across all the Performance View 360 scales**. A common profile characterized by self-ratings higher in some areas than how others rate themselves, but lower in other categories than other people rate themselves on the average

Looking at the overall height of the person's self-evaluation quickly tells you whether the person sees himself or herself as a high performer in general, a low performer in general, or as a person with some strengths and some weaknesses.

SHAPE OF THE SELF-RATING PROFILE

The next step is to look at the shape of the **Performance View 360** profile results. What **Performance View 360** scales are highest and which are the lowest? There may be a number of distinctive patterns that you should look for.

A MIXED PROFILE

In most instances, the **Performance View 360** profile results will be mixed with specific scales being above average and others are below average. Even when individuals view themselves as highly effective across most **Performance View 360** scales, they see themselves as more effective in some areas of performance than in others.

An inconsistent, jagged, "sawtooth" pattern may be an indication that the person's own self-perception is inconsistent and lacking any structure. However, at this level there is little about the profile that you would be safe to conclude with confidence. Before concluding anything, you should investigate further and, in particular, look at the relationship between the person's self-ratings and ratings from others.

A FLAT PROFILE

Whether high or low, a flat self-rating profile says that a person sees no particular area of his or her performance that stands out as particularly strong or weak to any other. Such a profile might be accurate in depicting the person's self-perception, but the chances are that it differs greatly from how the person is perceived by others. (You will see this when you examine the person's other ratings.)

Alternatively, a flat profile could mean that the person merely filled out the **Performance View 360** in a perfunctory manner rather than making any real attempt at self-description.

The flat pattern at least should alert you to the possibility that you may be dealing with a person who lacks a clear self-perception (i.e., poor self-insight).

More than telling you anything about what special strengths or development areas there may be, a flat self-rating profile may be a warning that the person is not very discriminating when it comes to self-perception. His or her self-perception may be affected by an overwhelming "halo effect", positive or negative, or in-between, as indicated by the distance of the profile from the average, 0.0 line.

ONE-POINTED PROFILE

Occasionally, you will see self-rating profiles that are relatively unexceptional except for one very noteworthy factor that deviates markedly from the rest of the profile. We call this pattern a "one-sided" profile.

With one-pointed profiles we can often find that people have become so focused on, or sensitive to, one facet of their performance (either as a strength or development area) that they may have become virtually blind to other aspects of their own performance. Alerting such people to the interplay between different **Performance View 360** scales often can help them develop a better-rounded and balanced self-image.

INTERPRETING OTHER-RATINGS

Your examination of self-ratings will give you insights into how a person views his or her performance on each of the 20 **Performance View 360** supervisory and managerial competencies. Now the question becomes, "How is this person viewed by others?" At this point, you are ready to look at the person's other ratings profile.

Keep in mind that when we refer to "other" ratings, the ratings may in fact be those of peers, subordinates or one's own manager. We use the term, "other ratings," generically to refer to ratings of a person's effectiveness by other people. In interpreting the **Performance View 360** profiles you need to know the whether or not those others are subordinates, direct reports, superiors or a mix of these people.

Before getting into details of other ratings profiles, you should get a feel for the overall pattern of the profile, just as you do in examining self-ratings. Many patterns of profiles are possible, but here again are certain things to look for to obtain a sense of the overall pattern. Here are three basic questions:

- What is the height of the profile? Overall, is it low, high or in-between? How far does it deviate from the norm (i.e., the 0.0 z-score line)? Is more of it above the norm than below? In other words, how effective (in general) is the person as viewed by others?

- What is the shape of the profile? Is mixed, with noteworthy highs and lows showing perceived strengths and development areas? Or, is it flat?

- How does the profile compare with the person's self-ratings profile? Are the person's "other" ratings higher or lower than average compared to the person's self-ratings? Does the "other" ratings profile follow the same shape as the self-ratings profile? Or, do the two profiles appear to describe two very different people rather than the same individual?

Comparison of self and other ratings typically reveals three distinct patterns. The first pattern is characterized as individuals who typically rate himself/herself higher than those of others. These individuals are commonly referred to as "over estimators." That is, many of the **Performance View 360** self-ratings fall above the 0.0 z-score line on the graph.

The second pattern is characterized by those who rate himself or herself as consistently practicing specific **Performance View 360** skills less frequently than others in our database. These individuals are commonly referred to as "under estimators." Finally, the third pattern is characterized as those who perceive themselves generally the same way as those of others. These individuals are commonly referred to as "accurate estimators" (either positive or negative).

Both "Over Estimators" and "Under Estimators" provide different potential issues and challenges in accepting feedback and modifying supervisory and management behavior in the future. Current research suggests that most employees have inflated views of their strengths and will tend to rate themselves higher than others. This initial profile provides some information about the level of self-confidence or self-esteem of the individual. Whether accurate or not, most "over estimators" tend to have a relatively high self-concept and self-esteem.

Most Frequent/Least Frequently Observed Behaviors

This section provides a summary of the most frequent and least frequent behaviors observed by each rater group providing feedback. This section summarizes these behaviors in table format showing a ranking of the 10 most and least frequently observed behaviors.

A summary of the behavior and performance factor along with the average score and frequency of responses for each rater group is presented (the number in the box indicates the participant's own self-rating on the behavior). This section is particularly helpful to identify specific behaviors to focus on for leveraging strengths and targeting developmental efforts targeting each of the different rater perspectives providing feedback (e.g., one's own manager, direct reports, all others).

Behaviors that tend to cluster in one competency or performance factor area may suggest a noteworthy trend to consider for developmental purposes. In general, the average scores are not important to evaluate in much detail—they are provided to indicate how the top 10 and bottom 10 behaviors were derived but caution should be taken to make sure that the "spread" of scores (shown in this section) does not suggest a polarized perspective between raters making the average score less useful to interpret.

Overall Item Summary

This section provides a table summarizing of each **Performance View 360** competency and item score (average) by each rater group as well as an overall average of all raters (excluding self ratings). Each **Performance View 360** item is grouped under its appropriate competency to assist in the interpretation of the results.

A feature of this section is an index of *Rater Agreement* shown in parentheses after the average scores for each rater group. This index of *Rater Agreement* ranges from 0 to 1.0 and is based on a statistical measure of dispersion or "spread" by raters called standard deviation (this index is derived at by subtracting 1 from the calculated standard deviation). An agreement index score of 0.0 suggests little or no rater agreement among those answering a specific question (i.e., the raters provided responses that had the greatest "spread" or difference from each other in their respective ratings such as some rating the item a "1" and others rating the item a "7"). An agreement score of 1.0 suggests uniform and consistent ratings by all raters providing feedback.

Agreement index scores **less than .50** might suggest greater diversity, inconsistency and "spread" among the raters. It is not uncommon to misinterpret "average" scores represented on graphic comparisons as being accurate. However, when the *Rater Agreement Index* is less than .50, it might suggest caution in interpreting these average scores (e.g., in reality, some raters might have a very positive bias in responding to the questions whereas other raters might have a very negative bias in responding to the same questions creating a "polarized" view of the respondent).

The *Rater Agreement Index* can be calculated at both the item (question) and competency level. At the item (question) level, it indicates the amount of rater agreement in answering each **Performance View 360** question. At the competency level, this index provides a clarification of how consistent raters were *across* all the items composing that performance factor (analogous to internal consistency reliability calculations at a scale level).

One question that is often asked is how a single rater can have a *Rater Agreement Index* score less than 1.0 at the competency level (agreement scores for a single rater will always be 1.0 at the item or question level). Again, this score indicates how consistent the individual rater was in answering the cluster of questions composing a particular **Performance View 360** competency.

It might not have much practical meaning but low scores should at least be explored in more detail about possible interpretations of a single rater providing very inconsistent answers across a competency category (e.g., rating one behavior in the *Planning/Organizing* a "1" and another behavior a "7").

Open Ended Question Summary

This section provides a summary of rater comments to two open-ended questions that are asked as part of the **Performance View 360** online questionnaire: 1) Strengths and 2) Developmental Areas. Written comments are reported back in the summary feedback report presented to the participant exactly as they are typed online, without any editing or changes. The written feedback comments are also presented separately by each rater category (e.g., manager, direct reports, team members, etc.).

It is important to keep in mind that written comments can elicit fairly strong emotional reactions on the part of respondents receiving his/her summary feedback report. Some written comments from raters might be quite evaluative, non-specific and presented in a negative manner. As a coach or trainer, it is important to emphasize "themes" surrounding these comments, rather than, focusing on a single comment that might represent a single individual's experience, perception or reaction. However, the written comments section may be very valuable to qualify and assist in the interpretation of the numerical data presented in previous sections of the **Performance View 360** summary feedback report.

Developmental Action Plan

This section provides a structured set of worksheets for summarizing strengths and developmental opportunities that come out of the **Performance View 360** feedback report. This is an important section for participant's to complete to synthesize the data provided in the summary report and enhance commitment to a specific professional development plan.

Research suggests that successful behavior change is enhanced when specific behavioral goals are defined and evaluated. The developmental action plan worksheets provided in the **Performance View 360** feedback report are designed to assist in the development of SMART (specific, measurable, action oriented, realistic and time bounded) goals.

Coaches and trainers using the **Performance View 360** should encourage the completion of these developmental action plan worksheets and discuss barriers and concerns about successfully implementing a specific developmental plan to enhance individual effectiveness. A key component of the action plan worksheets is a focus on feelings and emotions that the individual might have in response to the feedback received from multiple perspectives (e.g., from one's own manager, team members, direct reports, etc.).

Coaches and trainers should emphasize that the individual should use his/her feedback as perceptual data to be considered, weighed and evaluated as part of a commitment to a targeted professional development program. Additional feedback might be sought to clarify and enhance understanding of how one's behavior is experienced and perceived by others based on the results of the **Performance View 360** report.

Coaches and trainers should also suggest that individuals consider re-administration of the **Performance View 360** instrument in 10 to 12 months as a means of monitoring, tracking and evaluating behavior change efforts.

Talent Accelerator

A new web based tool is available from Envisia Learning called **Talent Accelerator** to help translate awareness from **Performance View 360** into lasting behavior change.

Talent Accelerator will provide your clients with a guided process for developmental planning based on best practices of how people change. The online tool is designed to help translate awareness from all of our assessments into lasting behavior change.

Talent Accelerator is equipped with an extensive and continuously updated competency-based library of resources including books, articles and other valuable development tools linked to each assessment you've selected for your client.

Development Tools within **Talent Accelerator**:

- **Development Resource Library: Talent Accelerator** resource library provides a comprehensive source of readings, websites, media, and suggestions to facilitate your client's development.

- **Development Suggestions:** For each assessment tool, specific developmental suggestions or tips are provided for your client to try on the job to enhance their effectiveness.

- **Development Planning "Wizard":** Our development "wizard" will walk your client through their assessment report and provide a structured way to allowing them to focus on those behaviors that are most important.

- **Feedback Reports: Talent Accelerator** provides you and your client with an electronic copy of your assessment summary report.

- **Automated Reminders: Talent Accelerator** allows your client to select how often they want the system to send them reminders about due dates on their development plan. As a coach, consultant or trainer you will also have the option of receiving daily emails summarizing development plan updates for your clients.

- **Development Journal: Talent Accelerator** provides an opportunity for participants to maintain a confidential journal to reflect on their reactions and feelings about their developmental journey.

- **Coaching Feedback:** You will have access to all of your clients' development plans as they are created and updated. You will be able to monitor their progress and add comments.

Section 4

Suggestions on Giving Feedback with the Performance View 360 Feedback Report

"Honest criticism is hard to take, particularly from a relative, a friend, an acquaintance, or a stranger."

Franklin B. Jones

The **Performance View 360** feedback report is rich in data and information. It is important to approach the feedback meeting with your clients (individual or workshop) in a supportive manner that will maximize integration of the information contained in the report to facilitate development planning.

This guide provides information and details about the different sections of the report. It is recommended that the following approach be used in providing feedback with clients using this instrument. It is always important to utilize active listening and probing skills during the feedback session with your client and be prepared for some expected defensiveness on the part of your client.

It is important to keep in mind the **Performance View 360** feedback results can be powerful data to facilitate behavioral change efforts aimed at improving self management, relationship management and communication skills. Remember that all behavior change requires the following three elements in order to be effectively sustained:

- **Awareness**--The individual must know <u>what</u> to change in order to initiate a behavioral change effort in the first place. The **Performance View 360** results provide targeted information to assist the individual to better understand his/her strengths viewed by others and to compare self-perceptions to those of others.

- **Motivation/Self-Esteem--**The individual must <u>want</u> to change and feel confident that he/she can be successful in both initiating and maintaining changes in his/her behavior. Individuals who lack motivational "readiness" will be least likely to initiate behavioral changes and sustain them for any reasonable length of time.

- **Ability--**The individual must possess the <u>ability</u> to change his/her behavior. Each individual has a unique set of abilities that can be improved with motivation and practice. However, the capability to be adaptable or improve a skill/ability may be highly individualized. Some individuals can develop "mastery" of complex and difficult skills/abilities. Others can merely improve his/her proficiency within a "band of competence."

The first step in the feedback process is thoroughly understanding the **Performance View 360** report and interpreting the results. Interpretation is definitely something you should not do "on-the-fly." You should be prepared to offer suggestions about actions the person might take developmentally in response to the feedback.

Most importantly, you should keep in mind that the feedback process is much more than an intellectual process. The emotional responses that are likely to emerge during the feedback (e.g., defensiveness, anger, denial) can act to either enhance or suppress self-insight and learning. So, before giving feedback, make every effort to anticipate how the person is likely to react emotionally to the information that he or she is about to receive. Your role is to help your client work through any potential negative emotional reactions from interfering with positive self-insight and motivation to improve in specific areas.

BREAKING THE ICE

The feedback process can evoke some tension and strong emotion in the person receiving his/her **Performance View 360** summary feedback report. The more you can ease your client's potential anxiety, the better the flow of the feedback process.

A good technique for easing tension, establishing rapport and breaking the ice is to spend some time talking about the person's background (e.g., work history). Even if you already know the person well, this is a very useful "getting started" activity. It frequently reveals information that you may not have known, shedding additional light on the **Performance View 360** results. Later in the feedback session, it may give you something concrete to refer to in an effort to link the **Performance View 360** results to actual work behavior and situations.

Most important, it requires active involvement and participation from the person receiving feedback. As anxiety and tensions ease, you can now begin active listening, establishing your role as a facilitator rather than the "talker" and "teller." Remember, you are hoping to help your client understand the results and use this data to improve critical interpersonal, social and self management competencies—one of which is to identify and control emotions and constructive behaviors that come from strong emotions.

SUGGESTED PERFORMANCE VIEW 360 FEEDBACK PROCESS

The following steps are suggested as a way to conduct an individual feedback meeting with your client using the results from the **Performance View 360** summary report:

1. Clarify the feedback meeting goals and provide an overview of the meeting (confidentiality, use of the data, who will receive the report, implementation of a developmental action plan, role of the client's manager in the feedback process, etc.). Answer any questions that the client has about these goals to minimize any anxiety and apprehension about reviewing the report.

2. Review the **Performance View 360** (**PV360**) competency model and brief description of how the report is structured. Review the **PV360** competencies.

3. Review the developmental action plan worksheet pages to set up an expectation that the result of the summary feedback report is to leverage the application of strengths and facilitate further development in specific competency areas.

4. Review the open-ended question section. This sets a tone of understanding written comments that might clarify the graphical and numerical data that is provided in the report.

5. Review the Self Awareness/Social Awareness section. Clarify the meaning of competencies falling into each of the four quadrants with respect to leveraging strengths and exploring potential development opportunities.

6. Review the Self-Management/Social Management section. Clarify the interpretation of the graphs (anonymity protection "AP", range of scores, average scores and number of raters if relevant) and discuss relevant trends.

7. Review the Most Frequent/Least Frequent section. Synthesize the similarities and differences by each rater group and discuss how these specific behaviors can be leveraged (most frequent--strengths) and increased or improved (least frequent—development areas).

8. Review and discuss the summary items/averages section. Clarify the meaning of the Index of Rater Agreement statistic. Look for trends between and within each rater group on the **PV360** items. Emphasize that this section provides a summary of the items grouped by each competency category to aid in the interpretation of the feedback report.

9. Discuss next steps (e.g., thanking raters for their participation, sharing some learnings with his/her manager and other raters, completing the development plan, scheduling another re-assessment in 10 to 12 months, etc.). Answer any specific questions the client might have and determine the client's readiness to change. Schedule a follow up meeting to discuss the completion and implementation of the professional development action plan.

PERFORMANCE VIEW 360 GROUP REPORT

The **Performance View 360** also generates a group or composite report that summarizes team strengths and development areas across the critical emotional intelligence view competencies being measured.

The composite report will look identical to the individual report (no written comments are included) and contain the same graphs, numerical information and data. This report can be useful for intact teams, departments and organizations as a way to identify group strengths and potential development areas.

Suggestions on Giving Feedback with the Performance View 360 Group Report

The **Performance View 360** group report contains a wealth of information that can be used to assist teams, departments and organizations understand strengths and target additional developmental interventions.

Coaches and consultants might want to be selective in which sections of the composite report are shared and used in a group feedback meeting or team building intervention. The results from the group report can be used within team building designs as data that can stimulate discussion and further analysis to improve team or organizational functioning.

Of particular interest for team building is the Most Frequent and Least Frequent tables summarized by rater groups. This section provides specific behaviors that are observed and experienced by team members as characterizing group strengths and development areas. Coaches and consultants might use this data to stimulate discussion about further interventions (e.g., targeted training, selection systems, reward systems) aimed at enhancing team functioning.

Appendix A

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Appendix B
Interpreting the Self-Awareness (Johari Window) View

Q: ***What is "self-awareness" and why is it important?***

A: Self-awareness or self-insight is an important aspect of any definition of emotional intelligence. It describes a type of intrapersonal "intelligence" often described as the ability to understand oneself and use that information to regulate one's own life (Sternberg, 1999). Research suggests that individuals who lack self-awareness might not accurately see the impact of their behavior on others, misjudge how others experience their behavior and lack the capacity to capitalize on feedback from others.

The Emotional Intelligence View 360 (EIV360) is based on the Daniel Goleman concept of EI measuring 22 competencies in four key areas including: 1) Self-Awareness; 2) Social Awareness; 3) Self-Management; and 4) Relationship Management

	Perception	Behavior
Self	Self Awareness	Self Management
Others	Social Awareness	Relationship Management

Q: ***How does the Emotional Intelligence View 360 assessment attempt to measure self-awareness?***

A: The alignment between self and other perceptions on a 360 feedback instrument serves as a "proxy" for insight and self-awareness. Most current definitions of emotional intelligence recognize the importance of accurate insight and awareness for work and life success (Goleman, 1995; Salovey & Mayer, 1990). The perceptual "gap" between self and other perceptions might be one metric to determine the extent to which an individual has a high or low level of insight or self-awareness.

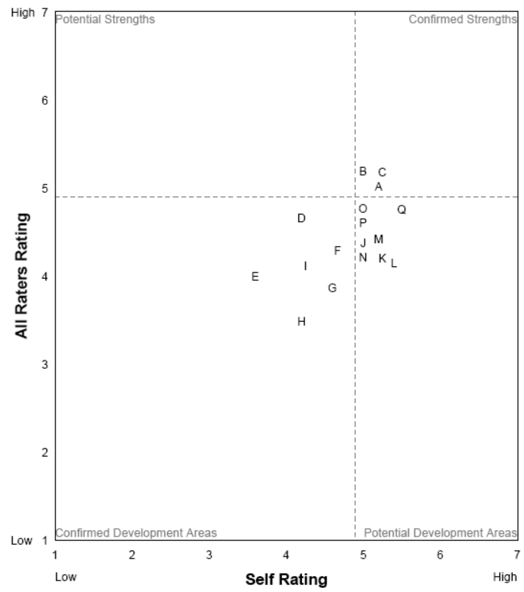
Each of the 22 EIV360 competencies is shown in four quadrants by each rater category indicating the extent to which self-ratings are aligned with other ratings. Self-awareness and Social-awareness can be categorized in four distinct ways:

1. Potential Strengths (Low Self-ratings and High Other ratings)

2. Confirmed Strengths (High Self-ratings and High Other ratings)

3. Potential Development Areas (High Self-ratings and Low Other ratings)

4. Confirmed Development Areas (Low Self-Ratings and Low Other ratings)



Average Scores

	Self	All Raters
Confirmed Strengths		
A. Strategic Problem Solving	5.20	5.02
B. Achievement Orientation	5.00	5.20
C. Oral Communication	5.25	4.95
Confirmed Development Areas		
D. Adaptability/Stress Tolerance	4.20	4.66
E. Self-Control	3.60	4.00
F. Building Strategic Relationships	4.67	4.30
G. Conflict Management	4.60	3.87
H. Interpersonal Sensitivity/Empathy	4.20	3.49
I. Listening	4.25	4.11
Potential Development Areas		
J. Self-Development	5.00	4.38
K. Trustworthiness	5.25	4.20
L. Leadership/Influence	5.40	4.15
M. Team/Interpersonal Support	5.20	4.43
N. Collaboration	5.00	4.36
O. Written Communication	5.00	4.77
P. Two-Way Feedback	5.00	4.64
Q. Oral Presentation	5.50	4.76

Q: Why is this section of the Emotional Intelligence View 360 often referred to as the "Johari Window" view?

A: The Johari Window, named after the first names of its inventors, psychologists Joseph Luft and Harry Ingham, is one of the most useful models describing the process of human interaction. A four paned "window," divides personal awareness into four quadrants: open, hidden, blind, and unknown. The lines dividing the four panes are like window shades, which can move as an interaction progresses (Luft, 1984). The four self-awareness quadrants of the EIV360 are conceptually based on this Johari Window providing a way to conceptualize self-insight based on the comparison of self and other ratings.

Q: How was the horizontal and vertical grid lines in this section of the Emotional Intelligence View 360 report derived?

A: The horizontal and vertical lines shown in the Self-Awareness section of the EIV360 report were derived from statistical analysis based on the large international norms that exist for this assessment. The mean self, manager, direct report, and peer ratings across all 22 EIV360 competencies were calculated and analyzed to direct the placement of these grid lines to facilitate interpretation of this report section. In most 360 feedback research using any type of rating scale, the distribution of scores tends to be negatively skewed with most respondents less frequently endorsing the lower ends of the scale.

Q: ***How big of a "gap" between self and other ratings is meaningful?***

A: The research with the Emotional Intelligence View 360 assessment suggests that a self-other score difference of at least .75 is likely to be statistically meaningful. This difference, or more, suggests that the perceptual differences between self and other raters are important to note and consider in the interpretation of the feedback report.

Q: ***How do I interpret a large number of EIV360 competencies in the "Confirmed Strengths" and "Confirmed Development areas" quadrants?***

A: According to emotional intelligence theory, individuals who possess self-insight and self-awareness are likely to be more successful at work and life because they have a more accurate sense of themselves and how others perceive their behavior and impact. Both of these quadrants reflect an alignment between self and other ratings and serve as a "proxy" for self-awareness (i.e., both self and other perceptions of the frequency of behavior expressed are moderately to very high or moderately to very low). When the majority of the 22 EIV360 competencies fall within either of these quadrants it might be interpreted as someone who has insight and awareness about his/her behavior. It is theoretically possible that both the individual and others are both inaccurate and equally share a distorted perception of how the person is really behaving.

Q: ***How do I interpret a large number of EIV360 competencies in the "Potential Strengths" quadrant?***

A: This quadrant represents competencies in which the individual's self-ratings are lower than the ratings from other rater groups. Some personality research suggests that these "under estimators" can often be described as highly self-critical, perfectionist, highly achievement oriented, have very high standards for self and others, and possibly lacking in confidence. There is also limited cross cultural research in

360 feedback to suggest that self-ratings might be influenced by nationality, culture and gender. One implication of having the majority of EI competencies in the "potential strengths" quadrant is that the individual receiving feedback will often focus his/her attention to those sections of the reports that appear to be more "critical" or judgmental (e.g., open-ended comments or the Least Frequent behaviors section). As a result, these individuals are often less inclined to "leverage their strengths" and seem to be focused more on their weaknesses or developmental opportunities. Coaches and others providing feedback should take note of this pattern in preparing for feedback meetings with these individuals. Consistent with EI theory, these "under estimators" lack an accurate calibration and view of how others actually experience their effectiveness on the job.

Q: How do I interpret a large number of EIV360 competencies in the "Potential Development Areas" quadrant?

A: Individuals who have an inflated view of his/her behaviors on the majority of EI competencies measured by the EIV360 are associated with higher risk for potential derailment based on recent research. These "over estimators" tend to have higher self-ratings compared to other rater groups and are likely to display more critical and defensive reactions to their summary feedback report. Coaches and facilitators can help respondents with this profile to identify strategies for helping others better appreciate their skills, efforts and accomplishments and constructively challenge them about the meaning of these rating differences.

Appendix C
Interpreting the Index of Agreement Score

"Not everything that can be counted counts and not everything that counts can be counted."

Albert Einstein

In each of the **View Suite 360** reports there is a section at the end that provides a summary table containing competency and item scores (average) by each rater group as well as an overall average of all raters (excluding self ratings). Each item or question measuring specific **View Suite 360** competencies is grouped under its appropriate competency to assist in the interpretation of the results.

A feature of this section is ***Index of Rater Agreement*** shown in parentheses after the average scores for each rater group. This ***Index of Rater Agreement*** ranges from 0 to 1.0 and is based on a statistical measure of dispersion or "spread" by raters called standard deviation (this index is derived by subtracting 1 from the calculated standard deviation divided by a scale-specific divisor).

An agreement index score of 0.0 suggests little or no rater agreement among those answering a specific question (i.e., the raters provided responses that had the greatest "spread" such as some a "1" and others rating the item a "7"). An agreement score of 1.0 suggests uniform and consistent ratings by all raters providing feedback (i.e., all rated the question the same).

Agreement index scores **less than .50** might suggest greater diversity, inconsistency and "spread" among the raters. It is not uncommon to misinterpret "average" scores represented on graphic comparisons as being accurate. However, when the ***Index of Rater Agreement*** is less than .50, it might suggest caution in interpreting these average scores (e.g., in reality, some raters might have a very positive bias in responding to the questions whereas other raters might have a very negative bias in responding to the same questions creating a "polarized" view of the respondent).

The ***Rater Agreement Index*** can be calculated at both the item (question) and competency level. At the item (question) level, it indicates the amount of rater agreement in answering each **View Suite 360** question. One question that is often asked is how a single rater can have an ***Index of Rater Agreement*** score less than 1.0 at the competency level (agreement scores for a single rater will always be 1.0 at the item or question level). At the *competency* level, this index provides a clarification of how consistent raters were *across* all the items composing that performance factor (analogous to internal consistency reliability calculations at a scale level).

Again, this score indicates how consistent the individual rater was in answering the cluster of questions composing a particular **View Suite 360** competency. It might not have much practical meaning but low scores should at least be explored in more detail about possible interpretations of a single rater providing very inconsistent answers across a competency category (e.g., rating one behavior in the *Administrative Control* a "1" and another behavior a "4").

Example with the *Index of Rater Agreement* in Parentheses

Questions	Self	Manager	Peer	Direct Report	Team Member	Average
Written Communication	**5.60 (0.84)**	**2.80 (0.67)**	**2.60 (0.69)**	**4.00 (0.24)**	**2.50 (0.66)**	**3.00 (0.47)**
Uses appropriate grammar, tense & language in written communications.	6.00 (1.00)	4.00 (1.00)	3.00 (0.67)	4.50 (0.17)	3.50 (0.83)	3.71 (0.47)
Uses written communications effectively & appropriately.	6.00 (1.00)	4.00 (1.00)	2.50 (0.50)	4.00 (0.33)	2.50 (0.50)	3.14 (0.42)
Writes in a logical & organized manner.	6.00 (1.00)	2.00 (1.00)	2.50 (0.83)	3.50 (0.50)	3.00 (1.00)	2.86 (0.67)
Writes in a clear, direct & concise manner.	5.00 (1.00)	2.00 (1.00)	2.50 (0.83)	4.00 (0.33)	2.00 (1.00)	2.71 (0.54)
Writes technical information in an easily understood manner.	5.00 (1.00)	2.00 (1.00)	2.50 (0.83)	4.00 (0.00)	1.50 (0.83)	2.57 (0.36)
Administrative Control	**5.20 (0.61)**	**2.40 (0.66)**	**2.60 (0.66)**	**3.90 (0.45)**	**2.70 (0.74)**	**2.97 (0.56)**
Establishes effective mechanisms to monitor & ensure that work is done on time & with quality.	6.00 (1.00)	4.00 (1.00)	2.50 (0.83)	4.00 (0.67)	2.50 (0.83)	3.14 (0.67)
Develops systems and procedures to monitor individual, team and organizational progress on projects, tasks and assignments	4.00 (1.00)	3.00 (1.00)	2.50 (0.50)	4.00 (0.33)	3.00 (0.67)	3.14 (0.48)
Develops systems to monitor budgets, costs, & expenses.	5.00 (1.00)	1.00 (1.00)	2.00 (0.67)	4.50 (0.50)	3.50 (0.83)	3.00 (0.47)
Follows-up with employees to monitor quality & effective performance.	7.00 (1.00)	2.00 (1.00)	3.50 (0.83)	3.00 (0.33)	2.50 (0.83)	2.86 (0.58)