The CPOA Catalogue

Center for Personal and Organizational Assessment

The Professional School of Psychology

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General Description

The Center for Personal and Organizational Assessment (CPOA) has prepared suites of inventories and related documents over the past thirty years that have been used extensively in training programs, as well as consulting and coaching sessions. They have also appeared in several widely read books that offer concepts and research findings related to these CPOA documents.

CPOA assessment instruments are distinctive in several important ways. First, **all of the CPOA inventories are based on extensive research and scholarship**. They are theory-rich and thus lend themselves to enhanced dialogue between a coach or consultant and their client. While many other inventories might have been derived from analysis of data gathered from large sources (the so-called empirically based inventories) they are likely to offer numbers that are interesting and perhaps valid--yet not yield the kind of insightful conversations that a theory-based assessment can produce.

Each of these theory-based CPOA inventories come in a packet of five printed booklets each with a copy of the inventory, score sheet, scoring range, and description of the concepts and theories that provide a foundation for the inventory.

Second, **most of the assessment instruments that focus on individual respondents provide three perspectives**:

- the respondent's own self-assessment,
- assessments of the respondent by other people, and
- assessment of the organizational environment (climate/culture) in which the respondent works and through which the respondent is being perceived by other people with whom they work.

In several instances, the respondent is also asked to predict how they think other people will perceive or judge their performance/behavior.

All of the printed CPOA inventories and booklets are available through the Professional Psychology Press (a sub-division of The Professional School of Psychology.)

Large scale sampling: CPOA can create and administer a digital version of all its assessment instruments. This digital survey can be used for collection from multiple respondents (such as all members of a team, department or organization). CPOA can provides multiple levels of analysis regarding results obtained from this digital survey.

Following is a listing and brief description of each assessment instrument available from the CPOA catalogue.

Organizational Assessments

These assessments can be engaged by an individual member of an organization who wishes to gain a better sense of their own perspective regarding the organization. This individual mode of organizational assessment is particularly valuable as a tool to be used by executive coaches in their work with members of the C-Suite. When used as an individual assessment, the inventory is available in printed form and as part of a booklet that includes the inventory, score sheet and interpretive narrative.

The assessments can also be engaged in its digital version by multiple members of an organization. CPOA provides each inventory in a Survey Monkey format. CPOA collects the data (as a "neutral" party) and provides a basic descriptive report back to the organization. More complex statistical analyses can also be provided upon request. Here are the available organizational inventories.

OA 1. VUCA-Plus Inventory

The concept of VUCA has been widely engaged over the past decade. The contemporary work environment is certainly dominated by conditions of

- Volatility (V),
- Uncertainty (U),
- Complexity (C) and
- Ambiguity (A).

However, there has not been a widely available inventory that can assess the perspective of individual members and multiple members of an organization regarding these four environmental characteristics. Furthermore, there are two related characteristics that further enrich our understanding of our mid-21st Century environment. These two characteristics are:

- Turbulence and
- Contradiction.

They both intertwine with and influence the other four environmental characteristics.

The VUCA-Plus Inventory is distinctive and would certainly be welcomed by the leaders of any organization that is trying to navigate through this challenging environment. Given as an individual printed inventory, VUCA-Plus can be administered by an executive coach to members of the C-Suite (or other valued members of the organization – such as members of a strategic planning group).

The VUCA-Plus inventory is available as a stand-alone assessment instrument or within a booklet that includes the inventory, score sheet and *interpretive essays (including a description of the polarities inherent in each of the six categories*).

This inventory, in digital form, can also be administered to a large number of employees (and other stakeholders) through the deployment by CPOA of Survey Monkey. Rich organization-wide conversations can ensue—especially regarding strategic and contingency planning.

OA 2. Organizational Cultures Inventory

Over the past two decades, extensive use has been made in postsecondary education institutions of the cultural analysis offered by William Bergquist. Two widely used books have been produced based on Bergquist's analysis. *This cultural analysis has subsequently been modified and applied to the description of cultures in health care organizations, and to the diverse strategies engaged by professional coaches in many organizations.*

The six cultures identified by Bergquist have been embedded in a cultural inventory that has been used in many organizational settings. An updated version of this inventory has recently been created. Respondents indicate the extent to which they perceive each of six cultures as dominant in their own organization:

- Professional,
- Managerial,
- Advocacy,
- Alternative/developmental,
- Virtual and
- Tangible.

The last two of these cultures have been added to the original four, based on the impact which digital technology has had on the workings of mid-21st Century organizations.

The Organizational Cultures Inventory is distinctive and yields valuable insights concerning the diverse perspectives and values to be found among various sectors of an organization. Given as an individual printed inventory, the Organizational Cultures Inventory can be administered by an executive coach to members of the C-Suite (or other valued members of the organization – such as members of an HR department). This single-respondent version of the Organizational Culture Inventory is available as a standalone assessment instrument or within a booklet that includes the inventory, score sheet and interpretive document.

This inventory, in digital form, can also be administered to a large number of employees (and other stakeholders) through the deployment by CPOA of Survey Monkey. Rich organization-wide or departmental conversations can ensue—and have been engaged many times over the past two decades. A guidebook for facilitation of these conversations is available by request from CPOA.

OA 3. Organizational Effectiveness Inventory

Making use of an extensive review of research done on effective organizations, fourteen characteristics have been identified that are key to successful performance. *This inventory measures the extent to which each of these characteristics is present in the respondent's organization.*

The first section of this inventory is quite distinctive. Respondents are to indicate how important each of these characteristics is for their own organization. In the second section of this inventory respondents are to indicate the extent to which each of these characteristics is found in their organization as it currently operates.

In this way, *the assessment being done is unique to this organization—for the criteria of effectiveness (gap between current and desired state) is defined specifically for the respondent's organization.*

This inventory can be filled out by a single leader of the organization—often in conjunction with coaching or consulting engagement. It can also be completed by all leaders of the organization or by all members of the organization.

It is available in both printed form (for use with one or a small number of respondents) or in digital form to be distributed (via Survey Monkey) to all or a large sample of employees. Multiple analyses are available, including a measure of the gap between current and desired state for each of the fourteen characteristics.

OA 4. Performance Review Inventory

This inventory focuses on the strengths and areas for development of specific members of an organization. The areas being assessed are those identified through an extensive review of research on effective job performance. The inventory is divided into three sections.

- The first section concerns the competencies that the person being assessed exhibits as a leader.
- The second section concerns the way in which he/she relates to other members of the organization.
- The third section contains several general and specific questions that require a brief written response.

As in the case of many CPOA inventories, *this performance assessment tool is distinctive in that it yields assessments at several levels*.

- The person being assessed fills out a **self-assessment version** of the inventory for themselves.

A second version of the inventory (assessment-by-others) is given out to other people. The breadth of the sample size can be small or large:

- the supervisor of the person being assessed (90-degree assessment),
- those with whom the assessed person works closely (180 degree),
- members of the organization who are impacted by and meet at least occasionally with the person being assessed (270 degree), and/or
- those receiving services from the person being assessed who come from outside the organization (360 degree).

This inventory becomes distinctive and particularly valuable with the introduction of a third version of the inventory. This version is completed by the person being assessed. They predict how the other people are going to rate them in each of the areas being assessed.

We know from research findings that those who are rated poorly on a performance inventory are also likely to inaccurately predict (too high or too low) the ratings of other people.

The conversation between a client and their consultant or coach following a comparison of self-assessment, assessments by other people, and predictions of assessments by other people can often be remarkably productive. The client is not only able to compare their ratings with those of people with whom they work, but also can test out their own assumptions regarding how other people perceive them and their work. This is a rare opportunity for a client to gain greater appreciation for their own performance in an organization.

Job/Team Design Assessments

CPOA offers a unique set of tools that provide an overlap between the world of the individual employee and the world of the organization in which they operate. Each of these tools yields insights regarding how to design an environment that is most empowering to the individual employee and the team in which they are working. Following are the available job/team design inventories.

 ## JT 1. TEAM Inventory

This assessment instrument enables a team to determine and influence the environment in which they are operating so that they might be most effective. Four elements are identified, several of which the team controls and several that the team doesn't control. Two of the elements concern the resources that are provided by the team (supply) and several are provided from outside (demand).

The four elements are

- Triangulation/support (external/supply) (T),
- Expectations/responsibilities (external/demand) (E),
- Authority/command (internal/supply) (A) and
- Motivation/energy (internal/demand) (M).

Each element has both a tangible and intangible foundation and is rated with regard to both tangible and intangible strength. With scores for all four elements and lines drawn between the two supply and two demand elements, *members of a team can determine the extent to which their team is "designed" in a manner that tends to enhance performance or diminish performance.*

The TEAM Inventory is accompanied by a set of instructions for how individual team members might score the four elements or how the team together might produce the score (and note where there is considerable disagreement among team members regarding one or more of the elements).

Instructions are also provided regarding how to score the inventory, graph results from the inventory, and lead subsequent conversations regarding implications of findings from results obtained. A brief essay on team design complements the TEAM instructions.

JT 2. RISE Inventory

This assessment instrument enables an employee to determine and influence the environment in which they are operating so that they might be most effective. Four elements of the employee's job are identified, several of which the employee controls and several that the employee doesn't control. Two of the elements concern the resources that are provided by the employee (supply) and several are provided from outside (demand).

The four elements are

- Responsibility (external/demand) (R),
- Intentionality (internal/support) (I),
- Support (external/demand) (S) and
- Enablement (internal/demand) (E).

Each element has both a formal and informal foundation and is rated regarding both formal and informal foundation. *With scores for all four elements and lines drawn between the two supply and two demand elements,* **employees can determine the extent to which their job is "designed" in a manner that tends to enhance performance or diminish performance.**

The RISE Inventory is accompanied by a set of instructions for how employees might score the four elements. Their supervisor might also be encouraged to complete the inventory with regard to their subordinate's job. Comparisons between these two ratings can be drawn during a subsequent conversation.

Instructions are provided regarding how to score the inventory, graph results from the inventory, and engage in subsequent reflections regarding implications of findings from the results obtained (potentially in conjunction with a coach or consultant). A brief essay on team design complements the RISE instructions.

Career Assessments

During the middle of the 20th Century, Henry Murray, a Harvard psychologist, wrote about the interplay between our personal needs (for example, our need for achievement or need for approval), and the environmental settings and events that press on us at any one point in time. When we look at the careers in which we participate, there are needs that we want fulfilled – and there are the presses associated with the organizational setting in which we operate.

As Edgar Schein has noted, our career is the meeting place between personal aspirations and the goals and mission of the organization: personal development and organization development meet in the career interstices. Following is a listing and brief description of the available CPOA career assessment inventories.

CA 1. Career Interest Inventory

Edgar Schein identifies eight anchors or themes that are commonly found among all people who are motivated to work. In modified (and updated) form these anchors are:

- Creative,
- Technical/Functional,
- Autonomous/Independent,
- Safety/Security,
- Service-Oriented,
- Challenge-Oriented, and
- Lifestyle.

Each of these anchors is assessed regarding relative preference in this inventory. The career anchor preferences of a respondent help to *determine the extent to which they are likely to find specific jobs and career paths to be motivating and the extent to which they will sustain high levels of activity and commitment to their job.* Members of organizations will prioritize preferences for specific anchors and tend to stay anchored in one area and their career will echo this in many ways.

In the descriptive document accompanying this inventory*, an important distinction is drawn between two different types of anchors. The first type of anchor is the so-called bottom anchor. The second kind*

of anchor is called a sea anchor. The second of these two types of anchors functions in a manner that more accurately typifies 21st Century careers than does the first type.

While ground anchors keep a boat from moving very far from its mooring and use the sea floor as the base of resistance, the sea anchor is primarily used to slow down (but not prevent) the drifting of the boat in open sea and is used to help guide the direction in which the boat is headed. Similar functions operate with ground and sea career anchors.

CA 2. Career Alignment Inventory

This CPOA inventory moves beyond the identification of career anchors to assess the respondent's perception of the alignment (or misalignment) of their organization with their dominant anchors. The inventory consists of four sections with each of the career anchors being represented in each section.

- The first section asks the respondent to assess the current status of their organization with regard to valuing their work associated with each anchor.
- The second section concerns the extent to which the respondent would like (desired status) the organization to value their work regarding each anchor.
- In the third section, the respondent is asked to assess the extent to which their organization recognizes and rewards them for demonstrating specific competencies related to each anchor.
- Finally, in the fourth section, the respondents indicates that the extent to which they would like (desired state) their organization to recognize and reward their performance of certain tasks related to each anchor.

Results from *this inventory provide "gap analyses" – the gaps between the extent to which the respondent's assessment of current and desired states are in agreement (or disagreement).* These gap analyses can be of particular value when considered by a client who is assisted by a coach or consultant and when considered by not only a respondent, but also their supervisor. When administered to an entire division or project team, the Career Alignment Inventory can provide valuable insights regarding the source of overall moral in this division or project team.

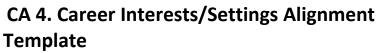# CA 3. Career Settings Inventory

While there are many factors that contribute to the nature and dynamics of the organizational settings in which we work, there is one fundamental factor that plays directly into the interplay between career need and press. This is the typical manner in which one's career is perceived and encouraged by the people and culture of the organization.

Michael Driver and Ken Brousseau proposed that one of four "career concepts" (and associated career paths) are promoted in most organizations. CPOA provides an inventory that builds on (and updates) these concepts/paths and suggests career opportunities associated with each concept/path:

This inventory provides a respondent (or group of respondents) with the opportunity to assess the extent to which each of these concepts/paths are prominent in their own organization. Together with a coach or consultant, the respondent can explore the career possibilities associated with each concept/path:

- *Linear Incline*. Possibility of moving up in the organization and finding many opportunities for career advancement as well as being recognized for your work and given greater responsibility and authority,
- *Steady State*. Possibility of engaging in a consistently structured job with clear and consistent job expectations as well as being recognized for a specific and stable work assignment,
- *Recursive Spiral*. Possibility of moving into job assignments that make use of your existing skills and knowledge while also requiring and enabling you to acquire new skills and knowledge, as well as being recognized for and given responsibility to engage emerging opportunities in your job that supports new learning while building on the foundation of your current successful work, and
- *Diffuse Opportunism*. Possibility of moving freely in and out of specific job assignments and organizationally defined expectations regarding your role and responsibilities, as well as possibility of being recognized for and supported in initiating bold new ventures both within and outside current organizational boundaries that may yield unanticipated beneficial outcomes.

CA 4. Career Interests/Settings Alignment Template

CPOA brings together results from the Career Interests Inventory and Career Settings Inventory in a two-dimensional (11x4) template that enables the respondent (and their supervisor) to **examine the extent to which their interests and their organizational setting are aligned**. Several "hot spots" are identified where research shows that there is a good match between interests and setting.

CA 5. CPOA Organizational Planning Template

A process is described for making use of several CPOA assessment instruments when addressing specific organizational issues. This process is based on Edgar Schein's premise that one's career provides the intersect between personal aspirations and organizational needs.

The planning process incorporates the Career Interest Inventory along with the other assessment instruments related to personal perspectives and preferences as tools for identifying personal aspirations.

The insights gained from these inventories are then paired with CPOA career-oriented assessments and job enhancement tools (RISE and TEAM) as they relate to the engagement of specific organizational issues. Results from the career-oriented tools on behalf of the organizational issue being addressed provide guidance for the identification of appropriate training and educational initiatives.

The CPOA planning template also provides a unique and valuable perspective regarding the nature and dimensions of organizational issues being addressed. Specifically, analytic tools are identified and described for discerning between organizational puzzles, problems, dilemmas and mysteries.

Important planning-based insights are derived from this analysis—especially when this analysis is related to the personal perspectives and preferences, and to the career-orientations and job/team related environments of those employees and stakeholders who are addressing these issues.
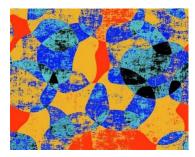
Personal Assessments

Each of these assessment inventories make use of the "Teleometric" design in the creation of each inventory. A series of brief case statements are presented that invite the inventory respondent to indicate the extent to which they think each of 6-8 responses to this case situation is characteristic of the way in which they would respond. They place their rating of each response on a scale from 1 (not characteristic) to 7 (highly characteristic).

Each response must be placed separately on the scale, with no overlaps. In this way, there is both a rating and ranking of each response. This inventory design requires the respondent to make careful discernments and yields rich insights that are not obtained through use of more traditional rating scales or simply ranking of preferences.

The distinctive Three Tier process of CPOA is engaged with each of these personal assessments: (1) self-assessment, (2) assessment by other people of respondent, and (3) organizational climate/culture in which respondent is operating.

These inventories have been used extensively in training and education programs, as well as consulting and coaching engagements. They are only now being made available for use by a more general training, coaching and consulting population. Following is a listing and brief description of each available personal assessment inventory.

PA 1. Interpersonal Preferences Inventory

The Interpersonal Preferences Inventory (IPI) is the most widely used of the CPOA instruments. Used for the past 30 years, IPI is based on the description originally provided by Karen Horney regarding the way people move toward other people, move away from other people, or move against other people especially under conditions of stress and anxiety.

IPI is distinctive in that it focuses on the shifts that occur when we confront opposition and adversity, as well as the ways in which our strengths can be overused or used inappropriately.

The four primary IPI preferences relate to the three primary colors (plus the rainbow that is a display of all three colors).

- *Moving toward* is portrayed by Blue,
- *Moving* away from is portrayed by Yellow and
- *Moving against by* Red.

Blended preferences are portrayed by purple (red and blue), green (blue and yellow) and orange (yellow and red). Complemented by several metaphors, *the color-coded interpersonal preferences are easily remembered and readily engaged in training, coaching and consulting conversations* about these preferences and their relationship to the style of leadership being displayed by the respondent. IPI is the most popular and frequently used of the CPOA inventories.

As noted, IPI yields an assessment of not only one's interpersonal preferences when things are going well, but also when the respondent is encountering resistance and is feeling anxious. As in the case of the other CPOA inventories concerned with personal assessment, *IPI is available not just as a self-assessment inventory, but also as an inventory completed by other people as they perceive the respondent's interpersonal preferences*. The third-tier assessment of the organization's culture incorporates ratings of the overall preferences in the organization for each of the interpersonal behaviors.

PA 2. Interpersonal Needs Inventory

The Interpersonal Needs Inventory (INI) is based on the description originally provided by Will Schutz regarding the needs that members of a team bring to their work. This inventory assesses the extent to which three needs are present:

- inclusion,
- Control and
- Openness.

Assessments are also made regarding the extent to which *those completing the inventory are proactive or reactive in their attempt to have each of these needs met* in their team.

Unlike the inventory (FIRO_B) provided by Schutz, CPOA provides a second tier INI assessment instrument *which invites other members of the team to identify the extent to which they think this person is seeking proactively or reactively to meet each of the three needs*.

Both versions of the inventory are easily completed (using the Teleometric design) and are much less frustrating to complete than the Guttman scaling design used by Schutz. As in the case of IPI, the concepts contained in INI are incorporated in a third-tier organizational culture inventory.

PA 3. Personality Styles Inventory

The Personality Styles Inventory (PSI) is based on the description of personality types originally provided by Carl Jung, this inventory yields scores regarding one's orientation toward

- Extraversion or Introversion,
- Sensing or Intuition,
- Thinking or Feeling, and
- Perceiving or Judging.

Unlike the widely used Myers-Briggs test, the Personality Style Inventory *provides a two-tier assessment. One can not only identify their own orientation, but also discover how other people tend to view their orientation.* Rich insights are produced by this second-tier assessment – especially for those who have already completed the Myers Briggs Inventory (or another of the widely-available Jungian-based inventories). *Surprises are often found when finding out how other people perceive the way in which we are oriented in our daily life.*

As is the case with all of the CPOA personal assessment inventories, PSI is available for administration to an individual as a self-assessment instrument. PSI is also available as a tier-two inventory that is administered to a certain number of the respondent's acquaintances (usually chosen from a diverse population in respondent's personal and work life).

The inventory is also available in a booklet, that includes both the self-assessment version and the assessment-by-others version, as well as score keys and an interpretive document. As in the case of IPI and INI, the concepts contained in PSI are incorporated in a third-tier organizational culture inventory.

PA 4. Organization Spectrum Inventory

As noted in descriptions of the IPI, INI and PSI, a third-tier assessment inventory is available that **brings together and integrates the concepts of interpersonal preferences, interpersonal needs and personality styles**. Three fundamental organizational cultures are identified:

- Red (assertive, action oriented, outcome driven)
- Blue (supportive, service oriented, people driven) and
- Yellow (analytic, reality oriented, data driven)

These three cultures are assessed along with three hybrid cultures: purple, green and orange. This inventory is aligned with and complemented by Human Spectrum theory. The Organizational Spectrum inventory can be taken individually by leaders of an organization. It can also be administered collectively to all members of a department or the entire organizations (in digital form using Survey Monkey).

PA 5. Human Spectrum

This document brings together and integrated concepts incorporated in four of the CPOA assessment instruments: the Interpersonal Preferences Inventory, the Interpersonal Needs Inventory, and the Personality Styles Inventory. The theoretical foundation of these four inventories is to be found in the work of

- Karen Horney,
- Will Schutz, and
- Carl Jung.

The Human Spectrum provides not only summary descriptions of the styles identified by these four scholars, but also ***an integration of these four theories in a single, rich human spectrum*** of colors and constellations of diverse perspectives and practices.