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On Construction of a Manual for Item 27 on the SCTi-MAP

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FOR ITEM 27 ON THE SCTi-MAP

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ABSTRACT

The Integral Sentence Completion Test (SCTi) was developed by Susanne Cook-Greuter in 1999. Her SCTi was a revision of the Washington University Sentence Completion Test devised by Jane Loevinger in 1970 and revised in 1985 and again in 1996. The test was devised to measure one's level of ego development by providing 36 stems and asking respondents to complete the sentence stems with whatever comes to their mind. Because the test is semi-projective, the scoring process requires training and familiarity with the test and with the concept of ego development.

Jane Loevinger devised a scoring system complete with rules. She and others created scoring manuals for the Washington University Sentence Completion Test complete with sample responses for each of the 36 sentence stems. The scoring manual was updated each time the test was significantly changed. Cook-Grueter is currently in the process of adapting the previous scoring manual to reflect changes in the SCTi. The purpose of this thesis is to provide a scoring manual for the sentence stem "People who step out of line at work--" (item # 27), which is one of the stems that was added by Cook-Greuter to the SCTi.

The first step was to review the history of ego development theory and measurement tools coming out of that theory. After reviewing general theory, it was necessary to analyze data that was provided by Cook-Greuter. In all, 627 responses were analyzed and placed into general categories for the purpose of creating a manual. Once the manual was created, an analysis of findings was done and discussed in the final chapter.

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CHAPTER I

INTRODUCTION

The purpose of this thesis is to provide a scoring manual for the sentence stem

"People who step out of line at work--", which is one of the stems making up the widely

used measure of ego development – the Integral Sentence Completion Test (SCTi, Cook-

Greuter, 1999.) This thesis consists of five chapters. Chapter one will provide a history

of ego development theory and the SCTi. Chapter two will provide an overview of ego

development theory and its measure. The reader will also receive a brief primer on

constructing and scoring the SCT and its close relative the SCTi. Chapter three will

highlight the methods used by the researcher in constructing the manual, and chapter four

will be the finished product – the scoring manual itself. A discussion of discoveries and

problems encountered by the researcher will be the topic of chapter five.

History of the Concept of Ego Development

In the late 1800s when psychoanalysis was beginning to come to the forefront, ego

development was not necessarily something that could be measured. To Freud and others

in his camp the ego was derived from and explained by instinctual drives (Loevinger &

Wessler, 1970.) Ego was something that simply "was" and not something that could develop and change over a lifetime. In the early 1900s Alfred Adler parted company with Freud due to their differing views on the ego. To Adler the ego was something that was not controlled by instinct; instead the ego had a drive to develop and could master instincts. Throughout life, one's ego could change and grow as it learned to master various instinctive drives.

Harry Stack Sullivan took Adler's ideas on ego development and further refined them. He developed the concept of the 'self system.' A major function of the self system according to Sullivan was to avoid anxiety through 'anxiety gating' (Sullivan, 1953 as cited by Hy & Loevinger, 1996.) He said that a person tends to selectively ignore those things that are not part of the 'self system' or frame of reference. To Sullivan, the search for meaning in experiences is at the core of ego functioning. The ego (i.e. self system) develops and maintains stability by selective inattention (e.g. ignoring those things that do not fit into its current state of being.)

According to Hy & Lovinger (1996) a central theoretical issue when looking at ego development is, "whether ego development is best characterized as a gradual evolutionary process or as a set of discrete stages, with distinct jumps from one stage to the next" (p. 3). One of the most influential theorists on the "stages" side of the fence was Jean Piaget. Piaget noticed in his work with children that children tended to give the same wrong answers to various questions as children of similar ages regardless of race or education. From this he theorized that children have their own way of making cognitive sense of the world. Upon further study Piaget suggested that humans develop cognitively in a stepwise fashion. He proposed four distinct stages: Sensorimotor, preoperational,

concrete operational and formal operational. As we mature from infants to adults, we move through these stages on a relatively predictable timetable.

 After Piaget proposed his revolutionary theory, many theorists proposed similar stepwise developmental patterns for different aspects of human cognitive and psychological functioning. Kohlberg (1964) proposed a stepwise development of moral reasoning. Other theorists include Peck & Havighurst (1960) who proposed character development; Isaacs (1956) with interpersonal relatability; Harvey, Hunt, & Schroder (1961) who posited cognitive complexity; and C. Sullivan et al. (1957) who forwarded the theory of interpersonal integration (Loevinger, 1987).

Loevinger built on the work of all of these people and developed the theory further. Instead of looking at the development of each aspect of human cognitive and psychological processes separately, she looked at the development of the whole – the ego.

> "For Loevinger (1976), the ego is a holistic construct representing the fundamental structural unity of personality organization. It involves both the person's integrative processes in dealing with diverse intrapersonal and interpersonal experiences, as well as the consequent frame of reference that is subjectively imposed on those life experiences to create meaning. The ego is referred to by Loevinger (1976) as the "master trait," subsuming other developmental domains such as developmental sequences of intellectual or worldview conceptualizations (Perry, 1970), stages of moral development (Kohlberg, 1969, 1981; Piaget, 1932), and stages of interpersonal understanding (Selman, 1980)" (Manners & Durkin, 2001, p. 542).

Like many of the theorists studying aspects of ego development before her, Loevinger proposes we as humans go through a series of stages. Through research, Loevinger theorized that there are seven distinct ego levels and four transitional ego levels. More will be said on these stages in chapter two.

Cook-Greuter collaborated with Loevinger in the 1990's and began to look more closely at the high-end level proposed by Loevinger (i.e. the integrated level.) She saw that not much research had been done on that level and undertook a dissertation on the subject in 1999. In the course of her research, she found that the Integrated level was not one level, but two: Construct Aware and Unitive, which leads to the levels as they are used today.

Ego Development Measurement

Jane Loevinger was one of the earliest pioneers of ego development measurement. She developed a measure called the Washington University Sentence Completion Test (WUSCT – later shortened to SCT.) "The WUSCT was first published in 1970 (Loevinger & Wessler, 1970; Loevinger et al., 1970), revised in1985 (Loevinger, 1985), and revised again in1996 (Hy and Loevinger, 1996). It consists of 36 incomplete sentence stems with the test instructions "Please complete the following sentences." The rationale for choosing this method was that it allowed people to project into the incomplete sentences their core level of ego functioning (Loevinger & Wessler, 1970; Loevinger et al., 1970)." (Manners & Durkin, 2001, p. 543.)

In the late 1990s Susanne Cook-Greuter obtained permission from Loevinger to revise the SCT. The result was the Sentence Completion Test Integral (SCTi.) More will be said about this particular test in the following chapter.

Development of the SCT Manual

When Loevinger devised the SCT in 1970 it was also necessary to devise a scoring manual. The first official manual for the SCT was developed by Loevinger and Wessler in 1970. It was in this first addition that Loevinger and Wessler devised the five scoring

rules that were to become the standard procedure for raters. These rules will be discussed

in detail in chapter two. When the SCT was revised in 1985, it was necessary to produce

a new scoring manual reflecting the changes in the test. This second edition was

developed by Hy and Loevinger in 1996. Finally, when Cook-Greuter created the SCTi

in the late 1990s, it was necessary to develop a manual for this test as well. There is as

yet no official manual for the SCTi, but various stems on the SCTi have been studied and

categorized. One might say the current manual for the SCTi is a patchwork quilt of

individual documents categorizing individual items. Eventually Cook-Greuter and others

would like to publish a complete manual for the SCTi.

Purpose of Research

During the late 1990s when Cook-Greuter was revising the SCT, she added some new

stems. In 1978 Molloy investigated the possibility of adding several new stems related to

the workplace. Among the stems he tested were "a good boss…" and "people who step

out of line at work."   He collected responses to these experimental stems and based his

doctoral dissertation on his findings. More will be said on Molloy's dissertation in the

following chapter. Although data has been collected and several people administering

the SCTi have begun incorporating the two new stems, aside from preliminary work by

Malloy and Cook-Greuter, neither of these stems have been properly categorized for

inclusion in a manual. The purpose of this thesis is to create a useable scoring manual for

the item, "people who step out of line at work." The data has been provided by Susanne

Cook-Greuter and the research for this thesis will entail categorizing the data for the

purposes of creating a manual.

CHAPTER II

LITERATURE REVIEW

The Work of Jane Loevinger

As was mentioned in chapter one, Jane Loevinger pioneered the idea of ego

development as a series of milestones. To her, ego development covered four domains:

character development, cognitive style, interpersonal style and conscious preoccupations

(Manners & Durkin, 2001.) Character development refers to impulse control and moral

judgment. Cognitive style is the level of complexity in one's cognition. Interpersonal

style refers to one's attitude towards others and interpersonal relationships: what types of

relationships one prefers and how well one understands those relationships. Conscious

preoccupations refer to those things that dominate one's thoughts and behaviors.

Examples may include conformity to the rules; responsibility, or the need for

independence.

Loevinger's concept of ego development refers to the progressive redefinition and

reorganization of the four factors listed above. Based on research, she proposed seven

distinct ego levels and four transitional ego levels. To each level and transitional level

Loevinger assigned an alphanumeric identifier and a descriptive label. The levels originally proposed by Loevinger were subsequently modified when the second version of the SCT manual came out (Hy & Loevinger, 1996.) The table below lists the levels as they were originally proposed by Loevinger and how they were changed in 1996.

Table I

Loevinger's Evolution of the Naming of the Ego Stages	
Loevinger 1978	**Hy & Loevinger 1996**
I-1 - Presocial Stage	E-1 - Infancy
I-1 - Symbiotic Stage	
I-2 - Impulsive	E-2 - Impulsive
Δ - Self protective	E-3 - Self Protective
Δ/3 - Transition from self protective to conformist	
I-3 - Conformist	E-4 - Conformist
I-3/4 - Transition from conformist to conscientious	E-5 - Self-Aware
I-4 - Conscientious	E-6 - Conscientious
I-4/5 Transition from conscientious to autonomous	E-7 - Individualistic
I-5 - Autonomous	E-8 - Autonomous
I-6 - Integrated	E-9 - Integrated

The Work of Susanne Cook-Greuter

Susanne Cook-Greuter expanded on the work of Jane Loevinger. Her concept of ego development involved three interrelated components: the operative component, the affective component and the cognitive component (Cook-Greuter, 2005.) "The operative component looks at what adults see as the purpose of life, what needs they act upon, and what ends they are moving towards. The affective component deals with emotions and the experience of being in this world. The cognitive component addresses the question of how a person thinks about him or herself and the world." (Cook-Greuter, 2005, p. 3.)

Just as Loevinger postulated, Cook-Greuter postulated that individuals slowly change throughout their lifetimes in all three of the above components – this constitutes ego

development. Cook-Greuter looked at Loevinger's proposed stages and went from there.

What she found when looking at Loevinger's latest proposed stage (Integrated) was that

the final stage can actually be seen as two distinct stages (Cook-Greuter, 1999). What

resulted from Cook-Greuter's discovery were nine stages of ego development. She calls

these nine stages "action logics" and she divided the "action logics" into four broad

categories, or as she refers to them – tiers. These tiers are referred to as preconventional,

conventional, postconventional and trancendent. The tiers and the corresponding action

logics are listed below with brief descriptions of each. Cook-Greuter, like Loevinger,

used a numeric and a descriptor to identify the levels.

First Tier Action Logics

First tier action logics are referred to as preconventional stages and are characterized

by impulsive, reactive, concrete cognition and affect. Below are the stages in this tier:

- 1 – Infant State: In this stage, the self is undifferentiated from the world around

  it. It is during this stage that infants learn to construct a stable world of objects

  and then slowly learn to separate themselves out as a separate object. Cognition

  at this point is pre-verbal. This stage is rarely seen in adulthood, and when it

  appears, it is found in adults who are institutionalized and completely dependent

  on the care of others.

- 2 – Impulsive: At this stage the individual has learned to see herself as an

  individual but has not yet mastered her impulses. Language is beginning to be

  implemented in the cognition process, but it is still simplistic and ego-centric (i.e.

  first person perspective.) One at this stage thinks of the world in black and white

  where people are either nice or mean. Moral development is virtually non-

existent at this stage. Although this stage is most often associated with childhood, it is possible for people to remain in this stage into adulthood. Adults in the Impulsive stage have a difficult time navigating the complexities of life and their sense of morality is based only on whether or not they get caught.

- 2/3 – Self-Protective: Those in the self-protective stage see the world in terms of their own needs and wants. They have a "me against the world" way of thinking and are constantly trying to assert their will over those around them. This stage is typically experienced in early childhood; however, adults can also be found in this stage. Adults in this stage tend to be manipulative and exploitive.

Second Tier Action Logics

The second tier action logics are called conventional stages. These stages are characterized by linear, logical, preventative thinking. Below are the stages Cook-Greuter placed in this tier. It should be noted that most Western adults operate at this tier.

- 3 – Conformist: Children and adults entering this stage are beginning to see themselves as part of a group. They tend to base their identity on that of the group and are usually bound by a set of "oughts" and "should." They generally have a fierce desire to be liked and accepted by their group, and will therefore do their best to conform to the rules of the group. Furthermore, people who are in this stage tend to see those outside of the group (those who do not follow the group rules) negatively. Those at this stage tend to have "us against them" thinking.

- 3/4 – Self-conscious: This is a transitional stage and therefore, many of the characteristics from the previous stage are visible here. The person at this stage is able to take a step back and look at themselves from a distance. They are beginning to differentiate themselves from the group, yet find it difficult at times since much of the conformist mentality is still within them. People at this stage have more complex cognition and are able to see beyond the "self" and "other" distinction. They take on what Cook-Greuter refers to as a third person perspective, meaning that they are able to work with abstract objects and concepts. This is a stage that is also characterized by inner conflict. The person at this stage struggles to free himself from the confines of the conformist stage and become an individual in his own right. This person often deals with the conflict by becoming intellectually aggressive and insisting to those around him that he knows the right answers.

- I-4 – Conscientious: People at this stage are beginning to take a longer view of things. People are beginning to see themselves in light of the past and future rather than just seeing the moment. This causes them to become more long-term goal-oriented and also causes a deeper sense of responsibility and morality. Those at this stage are very "rational" in their thinking and tend to pride themselves on being able to engage in self reflection and criticism. They are often insatiably intellectually curious about the "whys and hows" of life. People at this stage tend to believe that anything can be answered as long as enough intellectual rigor is put into studying it. It is at this stage where most western adults fall when tested using the SCTi.

Third Tier Action Logics

The third tier action logics, referred to as postconventional stages, are characterized by creative, systems-oriented thinking. Those in the postconventional tier are able to take what Cook-Greuter refers to as a fourth person perspective. They are beginning to understand that meaning is determined by one's own perspective and interpretation; therefore, it is possible for objects to have a variety of meanings to a variety of people. Below are the stages that fall within this tier.

- 4/5 – Individualist: This stage, like the self-conscious stage, is a transitional stage, and as such, many of the traits from the previous stage are visible here. At this stage self reflection begins to deepen. People become more tolerant of themselves and others. It is also at this stage that people begin to understand that things are not always what they seem to be because the interpretation of reality depends on the position of the observer – this is what Cook-Greuter calls a fourth person perspective. Because of this new fourth person view, individuals at this stage look at the rational thinking and the "everything can be figured out with enough thinking" attitude of the previous stage with disdain. Yet, part of them still resides in that earlier stage and feels uncomfortable with their new relativistic outlook.

- 5 – Autonomous: It is at this stage that people begin to take a systems approach to things. They can see the complexities and interconnectedness of several different systems and the fourth person view that was a struggle at the previous stage is now fully established. The person at this stage can more easily deal with conflicting needs and duties in constantly changing contexts. An autonomous

person can see conflicting aspects or polarities within themselves but are able to "own" and integrate those polarities without trouble. The central drive at this stage is self actualization (i.e. becoming the best that one can be.) Authenticity and autonomy are goals at this stage.

- 5/6 – Construct Aware: This stage is also a transitional stage. One at this stage is beginning to move into a fifth person view where the function of the ego as a central processing center is beginning to come to light. The construct aware person is beginning to see through the ego itself and is beginning to see the lifelong patterns they engaged in to protect the ego. They begin to realize that what they thought of as "self" was not self at all, but a series of constructs built by the ego to protect itself. To find true self, those at this stage want to move beyond the confines of the ego, yet they also have elements of earlier stages and desire to continue protecting the ego – these conflicting desires cause struggle at this stage. Very few Westerners are found in this stage (less than 2%.)

Transcendent Tier

The final tier is the transcendent tier sometimes referred to as the transpersonal or ego-transcendent tier. At this tier individuals are able to take a unitive or cosmic perspective. People at this tier can see themselves as individuals yet also see themselves as part of a whole. People at this tier are extremely rare in our Western society (less than 1%) and due to their rarity there is only one ego level at this tier, which is described below.

- I-6 – Unitive: Those at the Unitive stage have completely made the transition to fifth person view. A person at this stage can take what is known in Eastern

traditions as the "witness view." They are able to observe their own ego with honesty and without feeling a need to protect it. Persons at this stage are beginning to see themselves as part of all of humanity. They can look at people from earlier levels without judgment because the Unitive person sees him/herself as one with all people.

These stages as described above will be the basis of the research for this thesis.

Cook-Greuter's Collaboration with Torbert

In the late 1990s Cook-Greuter collaborated with Bill Torbert to make the concept of ego development applicable to the business world. Together they devised the leadership development framework (LDF). "The LDF is based on research that documents the human potential for life-long transformation. When applied to managers and leaders, the LDF provides a way of understanding how they tend to interpret events, and thus how they are likely to act in a given situation or conflict." (Cook-Greuter, 2004, p. 278).

During the course of his research collaboration with Cook-Greuter, Torbert relabeled many of the ego stages ("action logics") to reflect more of their essence and to be understandable to a wider audience. The table below shows the levels as named by Torbert compared to those of Cook-Greuter. Unlike those before him, Torbert used only descriptive labels and dropped the use of numeric labels.

Table II

Further Evolution of the Naming of the Ego Stages	
Cook-Greuter 1985	**Torbert 1998**
1 - Infant State	
2 - Impulsive	Impulsive
2/3 - Self-Protective	Opportunist
3 - Conformist	Diplomat
3/4 - Self-conscious	Expert
4 - Conscientious	Achiever
4/5 - Individualist	Individualist
5 - Autonomous	Strategist
5/6 - Construct Aware	Magician
6 - Unitive	Ironist

Development of the Washington University Sentence Completion Test (SCT) and SCTi

The original SCT grew out of research that Loevinger and others pursued on the attitudes of women towards family life and problems (Loevinger 1998.) One group in particular, (Loevinger et al., 1962) did a study of the personality patterns of mothers and women. They devised an objective test to try and map women's personality based on the prevailing theories of the day – mostly psychoanalytic in nature. When they analyzed the results from 346 participating women, they found that none of the resulting clusters corresponded to the theories the test was designed to test for. Out of their unexpected findings came the idea of Authoritarian Family Ideology (AFI.) AFI was a continuum in which women at one end tended to be 'authoritarian' and unable to conceptualize inner life. Women at the opposite end were more democratic, permissive and flexible.

Based on Loevinger's work Kitty LaPerriere conducted a study of mothers whose children had been referred to a child guidance clinic. Through that study she found that some women fell outside of the AFI continuum. Women falling outside of the continuum

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were antagonistic and resistant to authority. It was then discovered that authoritarianism was not an extreme, but a mid-point.

After that finding Loevinger began thinking of traits as a series of bipolar scales, she began to think of traitlike variables "in terms of a milestone sequence, with qualitatively different markers along its developmental course." (Loevinger, 1998, p3.) This marks the birth of Loevinger's idea of ego development.

To test her theory Jane Loevinger devised a semi-projective sentence completion test. The work on the original sentence completion test was begun by Elizabeth Nettles. She composed several sentence stems from various existing sentence completion tests and added stems that were of particular interest to her. The first Sentence Completion Test (SCT) was designed for use with women and girls. As was stated earlier, the original test, like most of its successors was composed of 36 "sentence stems." The test taker was to complete the sentences. Because the original SCT was developed for women, many of the stems were specific to women such as "A woman's body…" or "a pregnant woman…"

After further research it was determined that the test as devised lacked face validity when used for men (Loevinger & Cohn, 1998.) A test needed to be developed for men, therefore Loevinger modified the original test and created a men's form. The men's form contained many of the original items but changed some items that seemed inappropriate for men and replaced some items with items more acceptable to men.

As the test gained popularity in the use with both men and women Loevinger began to realize that the test as devised was not as appropriate for men. She found that although a men's form had been devised, the content for the men's form had been taken largely

from the women's form and was less valid for measuring the ego levels of male subjects. Therefore, Loevinger revised the test (1985) to be more appropriate for use with both genders. In devising the new SCT, Loevinger devised it in such a way that an abbreviated version could be used if desired. For those not wishing to use all 36 stems, they could use just the first 18 or the second 18 items of the revised SCT without loss of reliability.

Based on Jane Loevinger's revision of the SCT in 1985 Westenberg and others (1998) created a form that would be appropriate for use with adolescents. The result was the SCT-Y, which had two forms – one for girls and the other for boys. Much of the content came from Loevinger's 1985 revised adult form, but items were changed or replaced to be more relevant to children.

In the late 1990s Susanne Cook-Greuter obtained permission from Loevinger to revise the SCT. The new version of the SCT is referred to as the Sentence Completion Test Integral (SCTi-MAP.) Cook-Greuter maintained many of Loevinger's original stems but added some of her own. The SCTi was created to "better capture professional subjects in organizational contexts." (Cook-Greuter, 2004, p. 278.) The SCTi is the test on which this thesis is based.

From time to time over the years new stems have been suggested for both the SCT and the SCTi. The stem that is the focus of this thesis was added by Molloy in 1978.

Development of the SCT Manual

As was mentioned in the introduction, the first official manual for the SCT was developed by Loevinger and Wessler in 1970. The manual was known as a categorized manual due to the way in which it was devised. Loevinger and Wessler examined several

protocols. They evaluated the range of responses for each of the 36 stems and tried to find common themes and categories in the responses for each stem. Also, for each response to each stem they tried to determine what themes were indicative of what levels. The manual itself was laid out in sections. Each section was devoted to the scoring of one of the 36 stems. Each section began with a brief description of what kinds of responses are expected for the stem from people at various levels of ego development. Each section was divided into subsections – one for each ego level. Each subsection listed a series of categories that could be expected at that ego level. Along with each category example responses were given to help raters determine where a particular response fell.

Loevinger and Wessler devised a five-rule system for rating responses and dealing with "compound responses." Compound responses are defined as responses that have two or more ideas within them. They further divide compound responses into three categories.

- Pseudo-compounds – clichés: these are responses that add little meaning to the overall response such as, "A good wife – treats her husband with love and understanding." Love and understanding appear at first to be two different ideas; however, the phrase "love and understanding" has been used so much that it has lost the power of its original meaning.

- Pseudo-compounds – repetitious: This is a response that offers two ideas that are too close in meaning to be considered separate ideas such as, "My main problem is – I am sometimes too shy and self-conscious." Shy and self-conscious are concepts that are very close in meaning.

- True compounds: These are responses that truly present two alternative or contrasting views such as, "When they talked about sex, I – felt uneasy, but joined in, and tried to change the subject." This response has both affective and behavioral components making it truly more complex.

The five rules as devised by Loevinger and Wessler are as follows:

- Rule 1. Match the completion with one of the listed category titles
- Rule 2: Where the combination of two or more elements in a compound response generates a more complex level of conception, rate the response one step higher than the highest element
- Rule 3: Where the combination of ideas in a compound response does not generate a higher level of conceptual complexity, rate in the less frequent category or rate in the higher category
- Rule 4: In the case of a meaningful response, where there is no appropriate category and Rules 2 and 3 do not apply, use the general theory to arrive at a rating
- Rule 5: Where the response is omitted or is too fragmentary to be meaningful, it is rated [3 – Diplomat]" (Loevinger & Wessler, 1978. P 114-118.)

In the year 1996 Hy and Loevinger created a new manual to reflect the changes made in the 1985 updated version of the SCT. The construction procedure, the five rules and layout of the manual did not change from the original 1970 manual. Only the content was different to reflect the new stems.

No manual has yet been produced for the SCTi-MAP. Susanne Cook-Greuter and others have produced partial guides and notes for raters of the SCTi-MAP, but as of the writing of this thesis no official manual has been published.

Past Work on the Stem "People who step out of line at work…"

As stems have been added or changed throughout recent years, various attempts have been made to create manuals for those new items. Preliminary draft manuals for the item that is the focus of this thesis (people who step out of line at work…) have been worked on through the years. Perhaps the most significant yet elusive work on this stem was

completed by Malloy (1978). His dissertation proposed the use of the stems "a good

boss…" and "people who step out of line at work…" Unfortunately I, even with the help

of Cook-Greuter and Ingersoll, was not able to secure a copy of this elusive work. Many

have cited his work (Cook-Greuter, 2008; Torbert, 1998) but as yet, this researcher has

not seen the actual dissertation. The researcher did, however, confirm that the University

of Dublin has a copy of the dissertation. It is unfortunate that this significant source was

not available.

   This researcher did, however, have access to Cook-Greuter's initial attempt at a

manual for the stem, upon which she relied heavily. Cook-Greuter composed a

preliminary draft of a manual for the stem "people who step out of line at work…" in

2008. Some of the data used in the manual came from the data set provided to the

researcher, while other data was unique to Cook-Greuter's manual. More will be said on

the data set in the following chapter.

Validity and Reliability of the SCT and the SCTi-MAP

   Over the years several studies have been done on the validity and reliability of the

SCT. Most studies have shown that not only is the SCT reliable and valid, the concept of

ego development is a sound theory (Manners and Durkin, 2001). The most

comprehensive reviews were completed by Hauser (1976) and Manners and Durkin

(2001). Houser reviewed several studies across various disciplines that utilized the SCT

as a measurement instrument. He focused on data in these studies regarding the

reliability and validity of the measure.

   In terms of reliability, he looked at the reliability of the instrument as well as the

reliability of the scoring procedure. The scoring procedure requires training. When the

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SCT was first developed, scorers were personally trained by Loevinger. In 1970 Loevinger and Wessler created a number of self-training exercises. Therefore the first reliability studies on the scoring procedure compared raters who were personally trained to those who went through the self training. The studies Hauser looked at were based on 543 protocols from girls and women. Their ages ranged from 12 to 70 years old and they were mostly from middle- and working-class families. The interrater reliability of the personally trained raters was .86 and the interrater reliability of the self-trained scorers ranged from .89 to .92. When personally trained raters were paired with self trained raters the interrater reliability was .76. Because of the relatively high interrater reliability between self trained and personally trained raters "one can assume that all have used a comparable assessment procedure which is also congruent with the procedure developed by Loevinger." (Hauser, 1976, p. 935).

Studies that have been done on the reliability of the measure have looked at test-retest, split half and internal consistency. Hauser looked at two different studies – one involving 51 ninth-grade students and another involving a class of 81 undergraduate psychology students. Test-retest reliability for the total protocol ratings ranged from .44 to .76. For item sum scores, test-retest reliability ranged from .64 to .91. Split-half reliability with not time interval ranged from .85 to .90, and with a week interval the split-half reliability was .68. Internal consistency coefficients ranged between .80 and .89.

Hauser reviewed studies on the construct validity, predictive validity, and structural validity of the measure. One study testing the discriminant validity of the measure compared the SCT to IQ tests. Results indicate that although there is some correlation

between IQ scores and scores on the SCT, the correlation is sufficiently weak to suggest that ego development is indeed a separate construct from intelligence and that the SCT is indeed measuring that construct. Many convergent validity tests have also been done on the SCT. Many of these studies were undertaken based on Loevinger's assertion that ego is a "master trait." Under this assumption, researchers compared the SCT to various trait measuring tests and/or interviews. One such study looked at the results of the SCT as related to delinquent behavioral patterns in teenage girls (Frank and Quinlan, 1976). The study found that "Delinquent girls fell at lower levels of ego development than non-delinquent girls when scores were covaried for intelligence. Delinquent girls were more likely to fall at the Impulsive stage than non-delinquent girls, whereas more of the non-delinquent girls were above the self-protective stage." (p. 505). The study also found a significant correlation between street fighting and ego development. Those who scored at earlier stages were involved in more street violence than those that scored at later levels. These results seem to suggest that there is "support for conceptually predicted links between the specific ego development stage and interpersonal behaviors" (Hauser, 1976, p. 940). Other convergent validity studies have been done with similar results.

Predictive validity studies have suggested that although there are no specific behaviors that can be predicted through the use of the SCT, it is possible that certain behavioral patterns can be expected at various levels. Behavior patterns that have been studied include "helping behavior" (Cox, 1974); "responsibility taking" (Blasi, 1972); "conformity" (Hoppe, 1972); and "authoritarian attitudes" (Browning, 1983). Results of many of these studies were inconclusive showing that predictive validity is quite low for the SCT.

Other relevant literature

Since the creation of the SCT, various researchers have studied the effects of various testing situations and environments on the outcomes of the test. Hansell et al (1985) looked at the difference in results of the SCT given in pen and paper form compared to the test given as a phone interview. He found that the reliability and validity measures were similar for both formats but that the mean score for the tests given over the phone were significantly lower than that of the pen and paper test. A similar study undertaken by Streich and Swensen (1985), however, found no significant difference between the results of the SCT given orally and the same test given in written form.

Other researchers have looked at the effects of modified instructions on the outcome of the SCT (Drewers and Westenberg, 2001; Blumentritt et al, 1996). Also, Redmore (1976) of Washington University looked at the possibility of faking the SCT and found that it is relatively easy to fake an earlier level, but extremely difficult to fake a later level. In fact, she found that those who attempted to score at a later level tended to land in earlier levels than they achieved when not trying to fake good.

The SCT and the theories behind it have been applied to various fields of study. The earliest piece of literature found by this researcher was one written before the existence of the SCT when Loevinger was just beginning her research. Burwen et al (1956) gave a 24-stem sentence completion test of their own design to Air Force Cadets to determine their attitudes towards subordinates and superiors. Ego development theory has also been applied to psychiatry (Wagh and McCaulley, 1981; Browning,1986,) marriage and family (Nettles and Loevinger, 1983; Hauser et al, 1991; Billings et al, 2008,) multicultural studies (Bakken and Huber, 2005; Newman, 2005,) spirituality (Rosen and Nordquest,

1980; Meadow, 1992,) the business world (Rooke & Torbert, 1998; Simcox, 2005; Joiner and Josephs, 2007,) and to the counseling profession (Loevinger, 1980; Swensen, 1980; Carlozzi et al, 1983; Borders, 1989; Cook-Greuter and Soulen, 2007; Ingersoll and Cook-Greuter 2007). More will be said on the application to counseling in the discussion section of this thesis.

CHAPETER III

METHODOLOGY

Labeling System Used

Before describing the nature and procedures for the research it is necessary to define

the labeling system that is used for the scoring manual. In the previous chapter the

evolution of the names for the various ego levels was described in detail. For the purpose

of this thesis and the resulting scoring manual the researcher used the numeric labels

devised by Cook-Greuter and the descriptive labels as devised by Torbert. However,

there are two exceptions. Level 4/5 – Individualist is referred to as Pluralist and level 6 –

Ironist is referred to as Unitive (Cook-Greuter, 2008, personal communication.)

Additionally, level 1 – Infancy is not used due to the fact that it never appears in the

SCTi. The table below lists the levels as they are used in this thesis:

Table III

Ego Level Labels Used	
Numeric	**Descriptive**
2	Impulsive
2/3	Opportunist
3	Diplomat
3/4	Expert
4	Achiever
4/5	Pluralist
5	Strategist
5/6	Magician
6	Unitive

Participants

To begin a manual it is necessary to elicit as many answers as possible for the stem

for which the manual is being created. It is also necessary for those elicited responses to

be scored by individuals adept at scoring the SCTi. Data had already been gathered for

this thesis. Over the course of several years Susanne Cook-Greuter and her colleagues

collected data on several stems including the stem that is the focus of this thesis ("people

who step out of line at work"). Data were collected from people of various ages,

socioeconomic levels and educational levels. Demographic data on some of the

participants was available; however, some data came from anonymous participants who

did not provide demographic data. The data provided to this researcher in conjunction

with the data extracted from Cook-Greuter's initial draft of a scoring manual for this stem

provides 628 completed responses. Four hundred and forty six of those responses were

provided to the researcher in the form of tables. For each response the table provided the

item score, the total protocol rating, the total weighted score and a unique, randomly

assigned identification number for the respondent. When known the sex and age of each

respondent was also noted. The remainder of the responses (181) came from Cook-

Greuter's preliminary draft of the manual. No demographic data was provided for those

responses. The table below gives specific data on key demographic variables:

Table IV

SCT Data Collected for Item #52 Demographic Information			
N = 627*			
Gender		**Age**	
Female	218	18 or below	1
Male	216	20's	29
Not reported	193	30's	102
		40's	130
		50's	51
		60 or above	3
		Not reported	311
* 446 responses were provided and the remaining 181 were taken from Cook-Greuter's preliminary draft of the manual for this stem.			

After the data were collected, the items were scored based on the ego levels

developed by Jane Loevinger and expanded upon by Susanne Cook-Greuter. Because

there was no existing manual for the item, scores were based on past experience of the

raters and the general rating advice found in Hy & Loevinger's scoring manual (1996,)

which states, "Rate every response. Rate the response as a whole. Rate on the level of

meanings, that is, what the person meant to say. Deep-level inferences about what the

person meant are not appropriate; the response is taken at face value. Snap judgments

should not be made, but lengthy rumination does not improve ratings." (33.)

After responses were rated, it was found that all levels were represented by the data. However, levels below 2/3 (Opportunist) and levels above 5/6 (Magician) had only a few representative responses. The table below shows the number of responses falling into each ego level in the original data:

Table V

Item Rating Data for Item #52*		
N = 627		
Ego Level	**Lable**	**# of Responses**
2	Impulsive	3
2/3	Opportunist	21
3	Diplomat	40
3/4	Expert	145
4	Achiever	224
4/5	Pluralist	109
5	Autonomous	48
5/6	Magician	36
6	Unitive	1

*the above figures reflect the data as it was originally provided to the researcher and do not indicate recategorizations done by the researcher.

Procedure

Organization of Data

The first step in the process of creating a manual was to organize the data. The data was provided in a series of notebooks, which were then copied and scanned to preserve the original form of the data. The 446 responses provided in notebook form were then entered into Excel along with their item scores, and when known, the total protocol ratings (TPRs) and demographic data. This allowed for easy sorting. Responses were entered exactly as they appeared with no spelling, grammar or punctuation changes/corrections in order to preserve the quality of the data (Hy & Loevinger 1996.)

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The author also chose to preserve the original codes (subject IDs) created by those who originally gathered the data for ease of reference during the research process. The 181 responses from Cook-Greuter's initial draft were not included in the initial analysis of the data, but were added later.

Category Creation

Once the data was entered into Excel, time was taken to study the data to see if any themes or patterns suggested themselves. The researcher discovered four broad themes: cause, solution, effect and assessment.

After determining the broad themes which appeared to be emerging from the data, a new column was created in Excel for the purpose of assigning each response to one of the themes found. At this point the researcher did not concern herself with the item scores or TPRs, instead she evaluated each response according to the categories she had found. This task turned out to be a bit more difficult than she had initially thought. The researcher depended both on intuitive sense and on grammatical clues. Responses that fell within the "cause" category often used phrases like "do so because" or "have a reason…" Those indicating a solution used phrases like, "should" or "have to." Effect was often communicated through the use of words like, "get," "receive," "lose," or similar transitive verbs. Assessments made use of linking verbs (e.g. "are a nuisance.") In spite of having grammatical clues, the researcher found herself depending on intuition far more often than she would have liked. Furthermore, responses at later stages were often a blending of two or more broad themes making it difficult to definitively categorize them. More will be said concerning this limitation in the final chapter.

The next step of the author was to print the data, cut out each response individually, and group each one according to the four broad themes discussed above. This too was more difficult than intended because of the issues discussed in the paragraph above. Some of the responses were simply not assigned to a theme, or were assigned to two or more themes. These non-assigned and dual assigned responses were set aside until later in the categorization process. Those that could be placed into one of the four themes were further evaluated and divided into categories. The researcher at this point was still not concerned with ratings on individual items. The reason for not focusing on the ratings of the items was twofold. First, focusing solely on the content of the responses helped the researcher maintain objectivity when creating themes and categories. Second, grouping items based on content aided in the cross referencing which was required for the manual.

After several categories were created, the researcher looked at the items scores received by responses in each category. The researcher found that often a large number of responses from each category clustered around one particular rating. For example, the researcher named one of her categories "have a reason." When she evaluated the scores of responses falling into that category she found that most of them were rated at level 3/4 (Expert level.) Therefore, "have a reason" was chosen as one of the categories found in level 3/4. There were also times when scores within a category were split between two or more levels. This was the case with the category "should be reprimanded." The researcher found some responses rated at the Diplomat level and others at the Expert level within this category. In such cases the researcher evaluated the responses further to determine whether she was actually looking at two different categories with slightly

different shades of meaning. This turned out to be the case with the category "should be reprimanded." The researcher found that while responses at both levels spoke of the necessity of reprimanding the employee, those that were rated at the Expert level had the added idea of "appropriateness" (not just any reprimand will do – it must be appropriate.) Therefore, the researcher created two categories out of one: "Should be reprimanded" and "should be corrected appropriately." There were a small number of cases where differences in ratings could not be explained by differences in shades of meaning. For example, the response "irritate me" was originally rated at the Diplomat level. However, there were several responses of "annoy me" that were rated at the Opportunist level. This researcher did not find a strong enough difference in meaning to place them into different categories; therefore she re-rated the response and placed it at the Opportunist level.

After establishing several categories based on the data that were easily assigned to one of the four broad themes, the researcher began to work with the data that had been set aside. With these data, the researcher grouped them according to item score. After doing that, she looked at the data at each ego level and attempted to establish categories at each ego level. If there were responses that still did not seem to fit within a particular category they were set aside again. This was a particularly common problem at levels beyond Achiever, because responses at later levels tend to become more and more complex and unique, making them difficult to place into categories (Cook-Greuter, personal communication, 2008.)

After completing the second round of categorizations, the researcher took the uncategorized data items and determined whether they were compound answers as defined by Hy & Loevinger (1996) or whether they were simply unique non-compounds.

Rules two, three and four as devised by Loevinger and Wessler (1978) were applied to verify the item scores.

The compounds and unique non-compounds were left "unassigned" meaning that they were placed into the ego level in which they fell, but they were not placed in any particular category. In the manual all unassigned responses are placed at the end the categories for the ego level in which they fall with the label "Unassigned."

Once all 446 responses were placed into categories or otherwise accounted for, the researcher checked her results against those of Cook-Greuter (2008.) Categories found by Cook-Greuter that were similar to categories found by this researcher were merged. Cook-Greuter categories that were not similar to categories found by the researcher were further evaluated. In many cases the unique categories as found by Cook-Greuter were left as they were and simply adopted into this researcher's manual. In some cases, however, the researcher decided to redistribute the data in Cook-Greuter's categories to categories already established by the researcher.

After merging Cook-Greuter's data with the 446 responses provided to the researcher, the researcher reevaluated her 446 responses. She looked for responses she was unsure about and responses that were left unassigned. She reevaluated those responses to determine whether they would fit better in one of Cook-Greuter's categories.

Manual Construction

Once all responses were categorized and all discrepancies and/or problems in the data were resolved, the researcher constructed a manual for the stem "people who step out of line at work." As a guide, the researcher used the guidelines as stated by Loevinger & Wessler (1978) in their first manual. The guidelines, similar to Hy & Loevinger's advice

above, are as follows: "Our version is defined by three ground rules: (1) rate every response except omissions; (2) stick to the level of meaning, rather than counting words or interpreting underlying motives; (3) write in simple, intelligible English without neologisms or technical cant." (p. 19.) Rules one and two were applied during the categorization process. Rule three was applied to the writing of the manual. The researcher first wrote a description of each ego level and what types of answers a rater can expect for the stem at that level. Then, the researcher looked at the categories found at each ego level and assigned a name and a number to them. For example, in Susanne Cook-Greuter's preliminary work on this stem (2008) she found a category at the Diplomat stage which she called "should be reprimanded." In the draft for the manual just after the description of the Diplomat stage she writes, "1. –should be reprimanded." Under the category Cook-Greuter has listed some example responses. The researcher used the same method for composing her manual. She numbered the categories and chose appropriate examples from her data set. It should be noted that not all responses in a particular category were used as examples, but only those that provided the rater with an accurate picture of the category without being redundant. It should also be noted that all examples chosen were from the data set; none of the examples were invented (Loevinger, 1998.)

After all of the categories for each level were fully established and described, the researcher printed a draft of the written manual for the purpose of examining the categories across the ego levels. The researcher cut out each category along with the responses placed in that category to find similarities. Any similarities in categories across ego levels were noted in the manual – a process known as cross referencing. The

purpose of cross referencing is to aid the rater in scoring responses that are difficult to place due to the fact that they could fall into one of several similar categories. Cross references in the manual are noted in parentheses just after the category name. For example the cross references for the Opportunist level category "should be punished," the Diplomat level category "should be reprimanded," the Expert level category "should be corrected appropriately" and the Achiever level category "should be corrected in a respectful manner" were cross referenced to each other as follows:

Level 2/3, category 3: <u>should be punished</u> (3-1; 3/4-6; 4-6)

Level 3, category 1: <u>should be reprimanded</u> (2/3-3; 3/4-6; 4-6)

Level 3/4, category 6: <u>should be corrected appropriately</u> (2/3-3; 3-1; 4-6)

Level 4, category 6: <u>should be corrected in a respectful manner</u> (2/3-3; 3-1; 3/4-6)

The researcher found that many of the categories at later levels were unique and were therefore left without cross references.

Statistical Analysis

Because the responses, their ratings and their categories were all in the form of an Excel spreadsheet, it was relatively simple to do a statistical analysis. The researcher completed an analysis of the distribution of item scores. This researcher also began to look at various aspects of the responses and attempted to determine how those aspects fall out across the ego levels. Aspects the researcher looked at included, theme, perspective, degree of certainty, and beliefs about truth. The researcher was not able to complete a full statistical analysis on all aspects, but preliminary findings were written up as part of chapter five of this thesis.

CHAPTER IV

RESULTS

ITEM 27   People who step out of line at work -

Susanne Cook-Greuter had this to say in relation to the development of this particular

stem: "This is an item that was created in 1978 by Molloy to replace the family-oriented

stem "When a child won't join in group activities". The latter often seems inappropriate

or irrelevant to professionals in the business arena. Both items test the respondent's

attitude towards deviance, control, discipline, and relationship to rules (Cook-Greuter,

2008, p. 1)

According to Hy & Loevinger (1996), the stem "when a child will not join in group

activities…" is a stem that is easier to answer than other stems in the protocol. Their

reasoning is, "it does not make the person answering feel self-conscious, and it is more

structured" (Hy & Loevinger, 1996, p. 88.) They go on to say, "Content is a better clue

to ego level than in many others stems." (p. 88.) This fact makes the stem easier to rate

because its very structure seems to suggest some broad themes. The themes Hy &

Loevinger list are (a) why the child acts that way, (b) what to do about it, and (c) the long or short-term results.

This researcher found a similar situation with the replacement stem, "people who step out of line at work…" This stem suggests to this researcher four broad themes, three of which are equivalent to the themes found by Hy & Loevinger. The themes are: cause, solution, effect and assessment. Not all of these themes are seen at all levels, and when they are seen in multiple levels, they manifest differently in different levels. The themes are discussed below in detail.

Themes:

Cause: This theme is seen at all levels except the Diplomat and Unitive stages. At the earliest stages causes are very concrete and simple (e.g. "have a pain"). In the conventional tier causes are stated in broad terms (e.g. the employee has problems or the employee is ignorant.) At later levels, causes are more complex and the possibility for multiple causes is contemplated.

Solution: This theme is first seen at the Opportunist stage. At the Opportunist stage solutions most often focus on punitive measures against the employee (e.g. "should be punished" or "should be dealt with." Solutions become increasingly complex at later stages. People who tested at later levels saw that the solution should involve a fair dialog between the employee and management. At the Pluralist level and beyond, people see the possibility that the employee may be pointing to a larger problem in the organization, and therefore, the solution might include global changes to the organization rather than simple negative sanctions against the employee.

Effect: This theme first appears in the Opportunist stage and is seen in every stage after except the Unitive stage . At the earlier levels, the effect is more immediate, concrete and negative towards the employee (e.g. "get in trouble" or "go to the back of the line"). As the stages progress, effects become more complex, long-term and potentially beneficial in some way.

Assessment: The theme of assessment appears at all levels. Assessments can be negative or positive and they can involve an assessment of just the employee or of the whole system. At earlier stages assessments are simple and black & white. They also seem to focus on the employee (e.g. "are bad" or "annoy me"). As the stages progress, assessments become more complex and less black & white. At the very latest stages, assessments often involve a component of self-reflection.

Arrangement of Manual

Before presenting the stages and categories, it is necessary to say a few words on the arrangement of this manual. As was stated in the previous chapter, some data and categories came from Cook-Greuter's draft of the manual for this stem. Data and categories coming from Cook-Greuter's manual are noted in bold type. In cases where one of Cook-Greuter's categories was merged with one of the researcher's categories, the researcher stated her name for the category and followed it with Cook-Greuter's name for the category. Cook-Greuter's names are set off with parentheses and appear in bold type.

Manual

Stage 2 / Impulsive

This researcher's data set of 446 responses did not include responses from the Impulsive level. Below are the categories as listed by Cook-Greuter in her preliminary

draft of the manual for this stem. She had this to say about responses at this level, "The impulsive person interprets deviance as a sign of badness or that the person is sick. The complexity of the stem may also be difficult for people at the Impulsive stage to comprehend."

1. **are bad** (2/3-7; 3/4-23; 4-24)
   aren't very good
   are no good

2. **are sick** (2/3-1; 3/4-1; 4-3; 4/5-1)
   have a pain

Stage 2/3 / Opportunist (Self-protective)

The Opportunist sees this situation in terms of punishment and rewards. They view the employee's behavior as deviant and therefore focus on the punishments the employee might receive. Opportunists also have an element of self-protection, which causes some of their answers to be very self-centered (e.g. "annoy me").

1. **Bad motives** (2-2; 3/4-1; 4-3; 4/5-1)
   are trouble makers
   want to be the boss
   want attention
   hate the work
   are rebels
2. **are on some other line (vague)**

3. **should be punished** (3-1; 3/4-6; 4-6)
   Must be stopped
   should be walked on'
   must be fired

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4. <u>get in trouble</u> **(ask for trouble)** (3-3; 3/4-13; 3/4-14; 4-17; 4/5-7)
   Get yelled at
   Might get caught
   never do it again.
   can get caught
   get into trouble
   catch trouble

5. <u>**get me into trouble**</u> (3-4; 3/4-17)

6. <u>annoy me</u> (3-5; 4-18)
   Irritate me

7. <u>**are stupid**</u> (2-1; 3/4-23; 4-24)
   are crazy
   are idiots
   are fools

8. <u>**Inappropriate affect**</u>
   are fun
   show them!
   are a laugh

Stage 3 / Diplomat (Conformist)

   Answers at this level focus on the group. The employee is often seen as an outsider

because his/her actions do not conform to the rules of the group. Those testing at this

level often feel that the employee deserves to be punished for their actions.   They also

feel that an employee who steps out of line is a detriment rather than an asset to the team.

1. <u>**should be reprimanded**</u> (2/3-3; 3/4-6; 4-6)
   Must be disciplined
   should be disciplined
   should be chastised
   should be set right

2. need help (unelaborated) (3/4-10; 4-9)

3. suffer immediate and concrete consequences (2/3-4; 3/4-13; 3/4-14; 4-17; 4/5-7)
> *Must go to the back of the line and start all over again!??!*
> *Will have to wait longer for their lunch*
> ***get what they deserve***
> ***need to start over***
> ***often lose their job***

4. cause problems for the group **(upset things)** (2/3-5; 3/4-17)
> *Are destructive*
> *Are not around enough*
> ***Bring the company a bad name***
> ***hurt the team***
> ***make life difficult for everyone else***
> ***often upset the whole department***

5. Don't fit in/are unpopular **(combination of 'are unpopular,' 'are the young ones,' 'are annoying,' and 'don't belong here')** (2/3-6; 4-18)
> ***nobody likes***
> ***don't get invited to the party (concrete event)***
> ***are new***
> ***are foreigners***
> ***are a nuisance***
> ***are annoying***

6. are rare
> ***are rare***
> ***are few and far between***
> ***does not happen often here***

Unassigned Non-Compounds
> *Find something else to do*
> *Are often punished*
> *Should be reminded*
> *Should receive a big wet kiss on the forehead assuming that's not what they were looking for in the first place*
> *Really have to work at it because of our culture*

Ought to step back in line

Stage 3/4 / Specialist – Expert (Self-aware)

At this stage, many answers are still group-focused but show a tentativeness that is not seen at earlier levels. We begin to see the use of qualifiers such as "may," "usually," or "often." We also begin to see an inkling of sympathy towards the employee. The employee may have a good reason for his/her behavior, or the employee should be talked to or counseled rather than just punished. Also at this level, respondents are beginning to see that there is a possibility of several different outcomes (e.g. the employee may or may not be punished.)

1. has problems **(may have a problem)** (2-2; 2/3-1; 4-3; 4/5-1)
     tend to be discouraged
     Doesn't separate business and personal issues
     often have non-work issues.
     may have something bothering them
     are unhappy with a co-worker
     are not properly motivated
     have a difficult time
     may be lonely
     may not be up to it

2. usually have a reason **(may have a point/reason)** (4-1; 4-4; 4/5-2; 5-1; 5/6-1)
     usually have a reason
     usually have a reason for doing so.
     usually do so for a reason
     Do so for a reason
     may have a reason

3. usually have a good reason
     may have a good reason to do so.
     May well have a good reason for their action.

May very well have a good reason.
will usually have a really good reason for doing so.
may have a good reason for doing so.
Are usually doing it for a good reason
may be doing so for good reason.
usually have a good reason

4. should be handled/dealt with
    Have to be handled individually.
    need careful handling.
    need to be dealt with by management
    Should be dealt with by the boss
    should be dealt with

5. should be given more than one chance (4-7)
    should be given a second chance
    Should be warned and disciplined if they continue.
    should be given 3 chances
    should be given fair warning

6. should be corrected appropriately (2/3-3; 3-1; 4-6)
    should be reprimanding [sic] and "punished" accordingly.
    Need to be disciplined appropriately
    should be reprimanded in a rational manner.
    need to be confronted
    have a meeting with the supervisor of co-worker alone and after the incident and
        discuss the issue and the cause and what can be done to prevent the issue from
        continuing whether it be up to or outside the control of that person.
    should reap the natural consequences of their actions.
    should be confronted
    should be straightened out
    should be reined back in
    ought to be appropriately reprimanded

7. should be informed
    need to be immediately told
    Have to be told.
    should be pulled aside and spoken to.
    Should be spoken to.

should be made aware of their actions.
need to be told so and the matter discussed.
Need to have a talk with a supervisor
should be addressed
should be told that they have done so
need to be told of the consequences
should be told so

8. should be reminded of the rules
need to be reminded of our code of conduct.
should be reminded of the rules.
should be told of the proper rules

9. should be held accountable
should be held accountable

10. need counseling/special attention (3-2; 3/4-9)
need counseling
Should be counseled
should be counseled immediately
need counseling + guidance a few times.
need to be counseled.
may need professional help
need co-workers who can set boundaries.

11. need to be heard/understood (4-11)
need to be understood so you can find out what is bothering them.
probably need listening to.
probably need to be heard.
need to be listened to and understood.
need understanding

12. should be asked why (4-8)
should be spoken to to understand why they behave that way
need to be talked to, to find out whats [sic] going on.
Should be asked why, not [sic]
should be asked why.

13. are usually reprimanded (2/3-4; 3-3; 4-17; 4/5-7)
    usually receive negative sanctions
    generally get told off
    will be taken care of one way or another.
    get slammed unmercifully.
    are quickly put back in their place
    are usually corrected
    are sometimes reprimanded
    can be punished

14. suffer consequences (2/3-4; 3-3; 4-17; 4/5-7)
    will receive less rewards.
    are generally not promoted
    do not get bonuses
    don't get much support
    become unpopular in the team
    are not selected for foreman

15. usually get off easy (4-25)
    Can usually get away with it indefinitely!
    aren't usually held accountable.
    are usually given several chances.
    are rarely dealt with.
    sometime get away with it
    are sometimes promoted anyway
    are tolerated and even promoted
    are often left alone

16. bring consequences on themselves
    bring consequences upon them.
    will usually have it come back to them ten times more.
    eventually hurt themselves.
    are hurting themselves.

17. affect others **(concern with influence on others)** (2/3-5; 3-4)
    disrupt the work flow and often cause additional work for others
    affect everyone
    often waste the time of those who are trvjng to do their job.

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make others' jobs more difficult
are letting the team down.
should not be allowed to bring the whole workforce down
make it difficult for others to follow the rules

18. might be right/justified
  may be justified in what they are doing.
  Might well be right
  are sometimes right
  could be on to something

19. feel justified
  usually think that the company is not treating them fairly.
  feel that the rules don't apply to them.

20. do so out of ignorance (4-23)
  Probably didn't know the line existed.
  May not have been told where the lines are
  have misunderstood something

21. can be useful (4-21; 4/5-8, 5-2)
  Are useful to have if they contribute something valuable.
  can be useful.

22. better know what they are doing
  better have a damn good reason for doing it.
  best know what they are doing.

23. simple negative judgment (2-1; 2/3-7; 4-24)
  aren't being fair.
  frustrate me

24. simple positive judgment **(are interesting)** (4-22; 4/5-15; 5-8)
  aren't all bad.
  make a difference
  more power to them
  make me wonder about things
  keep every one on their toes

25. **Simple dichotomies** (black and white, either/or) (4-19; 4/5-11)
    are promoted or fired
    can be fun or awkward

26. **What do you mean?** (4/5-14; 5-4)

Unassigned Compounds:
    are rare in my department, but I make sure the action is addressed immediately
    usually do not know where the lines are so I help them by working with them.
    are definitely OK, but we should find out why.
    at mot get a slap on their wrist + are told to get back in line. Mostly everyone just talks about them.
    need to be told directly, not just gossiped about.
    sometimes have good reasons others will need a firm word to insure their actions will not be repeated.
    should not always be punished right away but they should not repeat the same offense.
    need to be reprimanded and the situation needs to be addressed honestly, or it will reoccur and get worse.
    imitate me. They know what they are doing, and in cases are just trying it out.

Unassigned Non-Compounds:
    Should be tackled about the issues.
    do so without concern about implications of consequences.
    Are generally trying to improve things.
    May see the lines differently.
    may need to.
    often do so because they are trying to be heard
    should step in if the situation warrants it.
    should understand that they have done so + understand the implications of their action.
    they, along with other people, should decide whether their behavior or the line itself needs to change.
    are inevitable but few and far between
    should never have been required to be in that line in the first place.
    were obviously in the wrong queue.
    have to deal with it themselves.
    I tolerate, then say something about it.
    the squeaky wheel gets the grease

are asked to explain themselves
need immediate feedback

Stage 4 / Achiever (Conscientious)

Responses at this level are more analytical than at earlier levels. Respondents begin

to question the motivations and causes for the "out of line" behavior of the employee.

Solutions become more elaborate and begin to take into account the rights of the

employee. At this level, many responses encourage a gentler approach to reprimands that

will benefit both the managers and the employee. We also see that respondents are

beginning to see the role that the passage of time plays in all situations in life. The

behavior of the employee, the causes of that behavior and the solution to that behavior is

looked at over time rather than at one point in time (e.g. pattern vs. one time event).

Views of the employee also begin to change at this level. Some responses view the

behavior of the employee as potentially good, brave, or forward-looking.

1. <u>**may have various reasons**</u> (3/4-2; 4/5-2; 5-1; 5/6-1)
   could be doing for many reasons.
   may have reasons for doing so.
   it's probably a lot of things that caused the issue.
   do it for a whole variety of reasons.
   will do so for a multitude of reasons.
   do so for a number of (good) reasons
   the reasons for their behavior have many causes

2. <u>specific reason</u> (3/4-2; 4/5-2; 5-1; 5/6-1)
   probably have their own adgenda
   are for whatever reason not as (coerced)/(motivated) to stay "in line" as those who
      do
   are usually trying to make a point.

*are often doing so to revel against unduly restrictive rules and regulations of their
    employers.*

usually are testing (trying) the limits.

3. **may have a deeper psychological/developmental issue** (2-2; 2/3-1; 3/4-1; 4/5-1)

are probably have difficulty accepting some event/occurrence.

often are troubled some other are of their life.

are distressed and need to discharge feelings to get beyond

*are generally people who have a propensity to step out of line at school, at home and
    just about anywhere.*

often have poor people skills.

may have deeper problems or issues that need to be worked out.

Usually have personal problems as well

are fighting something within themselves.

Are typically having other problems in their lives.

usually have some problem with may not be immediately apparent

may feel shut in by over-restrictive rules

are usually insecure and it's their way of expression themselves

may be anxious or emotionally upset about something

4.   **go through a temporary phase**

may go through a phase

may learn to deal with dissatisfaction and boredom in more constructive ways

often come around in their own good time to seeing a better solution

do so as part of their learning and development

5.   **may respond to the faults in the set up** (4/5-12)

are probably expressing that there is something wrong with the set up

usually do so because of the uselessness or boringness of work

6.   should be corrected in a respectful manner (2/3-3; 3-1; 3/4-6)

*Should be first praised for their good qualities at work and their problem solve with
    them to bring them back in line.*

*need to be taken aside to discuss what they have done in a positive and caring
    manner in order to get the message through abut at the same time they do not
    feel bad about whatever they may have done.*

*deserve to be recognized for their unconventional behaviour and developed to take
    risks responsibly.*

are to be noticed, encouraged but checked if they go too far.

should be made aware of this in a discrete manner

should be spoken to nicely but firmly

should be told in a diplomatic way that their behavior is unacceptable

should be approached with respect and firmness

should be treated first with understanding, then admonished and held accountable

should be gradually and firmly brought back

should be gently reminded of their responsibility towards their work mates

7. should be given the benefit of the doubt (3/4-5)

Should be given the benefit of the doubt; everyone makes mistakes or poor judgments

need to be corrected, but given the benefit of the doubt, and allowed to make appropriate correcting.

are given many chances to correct their behavior and become successful with our company.

8. should be allowed to discuss their side (3/4-12)

Need to be pulled aside privately, addressed in a matter-of-fact way about the incident, offered some solutions, given a chance to explain and then should commit to "watching their steps."

and are disobedient, rebellious, bloodyminded, and obstreperous usually have some sort of grievance which needs sorting out and you need to give them an opportunity to open up and discuss their [?]

should be confronted about their behavior, but should be given the opportunity to explain their actions.

should be talked too [sic] to find out why and if there is something to be learned from either side

should be given a chance to explain their actions

can talk to me and we can assess if we can work together in transforming our organisation.

should have their point of view respected

ought to be able to explain why

deserve to be heard

need to be listened to for their reasons

9. need help, counseling, feedback, coaching (more elaborate) (3-2; 3/4-10)

Need help, for the comfort of themselves and others

perhaps need careful understanding and help

they are lucky if they have a mentor or colleague who can help them adjust

it is good to have people on staff who are specialized in helping them

need to be worked with to help identify what the behavior was and why it was inappropriate

may need careful counseling to find out what is bothering them

should be counseled as to how better to express their dissention while still being respectful of others.

need feedback on "what the line" means, why it's there and [ ] as to what they can do about it.

need feedback to get back on track. If the problem is chronic, then they should be separated / moved.

should be coached about appropriate behavior

should be coached, advised be given a chance to restore themselves, rather than be castigated, disciplined or punished

may need a coach to work on their issues

good coaching can do a great deal to help them improve

10.   pattern vs one time event (4-13; 4/5-4)

frequency and degree is a consideration.

Should be encouraged not to do so by discussions with them. However, if they continue to do so their influence should be restricted or they should be dismissed.

should be coned and if it doesn't work then they should be dealt with is stronger methods.

should be told that they have done so, initially in an advisory manner but if repeated in a more formal and forceful way

can be forgiven for a "one-off" occurrence but must be disciplined if their behaviour is excessive.

should be given a very stern warning and dismissed if they do not begin to conform.

are spoken to privately at first, and then reported if it's serious.

must be punished accordingly, but only if it is common practice and not a once-only misstep

should not be told off the first time, but if it happens regularly, this should be dealt with

should be reprimanded. If constantly out of line other options exist.

if not constant, some flexibility on the side of the manger is useful

11. should be listened to/understood (3/4-11)

should be listened to before judging them.

need to be understood and dealt with accordingly, with firmness and compassion.

shall have an opportunity to be listened to about what's bothering them.

should be listened to

should be listened to so we understand why they did what they did.

may need listening to and may need challenging

should be listened to before any reaction occurs.

should be listened to and taken seriously

12. should be evaluated/investigated (4/5-5)

should be evaluated on their explanations as to why they stepped of line as it may or may not be justified

should be "investigated" to see why, if they are really out of line, then helped to understand the difficulty.

should not necessarily be punished. The source for their action should be determined and investigated in order to resolve the problems upon which their behavior is based.

the root cause of their behavior should be carefully investigated

should have their reasons for doing so investigated

13. several possible solutions (4-10; 4/5-4)

should be sacked, ignored or promoted

have a greater chance these days of retribution. If serious enough, transgression will trigger formal procedures, starting with counseling + warnings. Alcohol during office hours is frowned upon more and more.

14. should be spoken to (more elaborate) (4/5-3)

need to be told what the expectations are of them and what the consequences will be but they are usually not.

should have the opportunity of being told is expected of them and the consequences of what will happen if the expectations are not met.

should have guidelines and expectations restated to them in order for the person(s) to understand the consequences if they step out of line again.

should be spoken with to understand if their alignments are in congruence to the organization

should be told so they can understand and work with the consequences.

know it, but are counselled in a private, supportive "opportunity to grow" way

should promptly be brought in for discussion of the situation, allowed to participate in the solution and held accountable for their future behavior.

should be told what they are doing wrong immediately in order for them to know where the boundaries are and/or them to improve. Depending on the severity, appropriate action may be needed.

15. responsibility for success/change placed on employee

should be aware of how far they can step.

are rarely noticed by me because people should sit their own boundaries and values.

need the style to carry it through.

need to readdress what their goals are in relationship to the job as a whole

should realize the potential outcome(s) and work for change instead

need to be aware of what they are getting themselves into.

ought to be aware of their privilege to work

16. <u>need to be told how they affect the organization</u>

need to be steered in the right direction and shown the effect their behavior has on everyone surrounding them.

need to be shown how their actions have a negative impact throughout the entire organization. This way they can move towards being more productive team players.

need to be told clearly and honestly how their action affects their position

should be informed of how it effects other people's and their effectiveness.[sic]

need to know how their actions affect others and why it is "out of line".

need to understand the effect it has on the group

need to understand the consequences of their actions on others.

should be made aware of the impact their actions have on the people around them.

should be made to understand that it is unfair to others

should be checked because someone else may suffer for it

should be reprimanded as it causes dissent in the group if someone does as they please

17. <u>suffer various consequences</u> (2/3-4; 3-3; 3/4-13; 3/4-14; 4/5-7)

often end up regretting it

usually end up losing effectiveness if they have been crude or offensive.

inevitably provoke some consequence sooner or later, but this is not always a bad thing.

do not often benefit from their actions

usually regret it

will probably cause more trouble for themselves than they intended

must accept the consequences

18. <u>are judged by others</u> (2/3-6; 3-5)

Are unacceptable and not understood by others who pass judgment on them

are annoyances to the people they work for + should be prepared to seek alternative employment.

annoy me if they are not pulling their weight

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are perceived as trouble makers and watched more carefully

19. either or (3/4-25; 4/5-11)

   are either very smart or very dumb

   often show their immaturity or they're pointing to something that is distressing them among other things.

   are taking risks they believe are appropriate or just acting out; who can tell?

   are councelled or reprimanded.

   Are one of two things: 1. Troublemakers who won't follow the rules; 2. Standing up for themselves.

   if right should be supported, if wrong may need further questioning

   are either rebellious or may have a valid reason for doing so

20. have something to say (4/5-9; 5-6)

   have an important story to tell.

   May have something valuable to say

   may have more to say than their actions indicate.

   Probably have something interesting to say.

   may be saying ????????

21. can be an asset to the organization (3/4-21; 4/5-8, 5-2)

   often ask the question "why" and that's good for others and for the organization.

   can sometimes have something different and useful to contribute.

   are just starting new lines

   are no longer in line and may be offering a valuable perspective

   are an important part of the mix.

   may be very valuable and it would be worthwhile to find out why they do it

   may be the ones who will take the business forward.

22. misc. positive assessment **(beginning recognition of individuality as positive)** (3/4-24; 4/5-15; 5-8)

   can be the most creative people, if managed well.

   May be innovators

   are probably the most interesting.

   are probably creative

   often deserve credit

   aren't necessarily wrong

   are brave

   get things done

should be praised!
Are perhaps being creative.
probably have something more important to do.
are usually more worthwhile than people who don't
are often brave and to be admired
may aid progress
how some backbone
are individuals
are creative

23. are unaware (3/4-20)

    may be in the wrong line who will help them to know?
    often do so without realizing they have gone too far. And can soon be guided back if it is important
    may not be aware of the lines.
    do not realize that they are out of line. Usually, there is no line.

24. **are unfair, selfish, uncommitted** (2-1; 2/3-7; 3/4-23)

    are unfair to their co-workers
    are not being fair to the rest of the team
    do not take into consideration the needs of others
    tend to only see their own situation
    should show more solidarity and commitment
    need more purpose and show loyalty to the company

25. Are not always punished (3/4-15)

    sometimes get away with it.
    are not always reprimanded or held accountable
    are often not dealt with in a timely fashion
    may not be questioned till the damage is done

26. individual commentary (4/5-16; 5-5; 5/6-2)

    Don't bother me at all if they step out of line with me I can usually jolly people along.
    initially frustrate me, often though I am able to ask the questions "Why did that happen? What was behind their behavior?"
    may *make me irritated, but I also understand what it means to feel bound by constraints and stupid rules*
    make me see why I am careful about my behavior.

help us understand how others see and respond to our actions

Unassigned Compounds

may genuinely not be aware of how their actions of words are affecting other people and need to be confronted in a calm and positive manner.

Should be encouraged to understand the impact of their behavior on others – and if they persist they should be disciplined

Do so for a good reason which should be understood before reacting to in any way.

have a reason for doing it, we should spend more time finding out

often believe they have valid reasons to step out of line. They should be listened to however, boundaries must be set + communicated and consequences must be made known of behavior ignorance

need to be understood. This type of behavior is usually caused by a misunderstanding of a given situation

need to be understood, because they may be right!

must have a good reason. We should listen to such people there aren't many of them.

need to be understood. They usually have a reason, and sometimes it is important and changes the situation.

have reasons for their actions that should be heard and accepted before action is taken.

are the risk-takers and need to be recognized and valued they may help the organization move forward.

Are in the minority and in my experience are demonstrating the view to try something different.

should be given an opportunity to air their issues and then be given coaching as needed to help them get back in line. If nothing works, they should suffer the consequences of their behaviors.

must first work hard to discover the line, but if they do manage to find it + cross it then it is bad news

are at risk of being slapped down if it's out of order and need a [?]/understanding as to why they do step out of line.

probably have a reason and efforts should be made to get to the root problem / issue.

drive me crazy! There's ways of doing things & getting you point across without unprofessional

can be useful to improve understanding if they make mistakes they deserve another chance but if they deliberately break rules they have to go.

must first work hard to discover the line, but if they do manage to find it + cross it then it is bad news (R3)

do not consider the big picture impact of what will happen if they do something or behave a certain way.

need to be confronted and redirected.

do so at times because they are not heard any other way.

should first be explained as to why.

Are taking risks.

make a manager's job interesting.

Are best characterized in a variety of comic strips

only do so if they abuse the trust of confidence, of colleagues or fail to respect them as individuals.

take risks

may not be given the opportunity to move to jobs that are a better fit

should be asked to step back in again and try and behave fairly in the future

Stage 4/5 / Pluralist (Individualistic)

The analytical answers that began at level 4 become more elaborate here. Not only are causes for the employee's behavior considered, but the Pluralists sees the possibility that there may be many complex causes for the behavior and that the employee's own psychology may play a large role in that causation. Solutions at this level become more elaborate and more cautious. Many Pluralists who suggest a solution do so by stating that it is important to fully analyze all aspects of the situation before taking action. They also emphasize the importance of getting the employee's viewpoint before going forward with a plan.

At this level, the possible merits of the employee's behavior are also recognized. A Pluralist sees an "out of line" employee as a possible agent of change or a chance for the organization to learn something new.

1. May have complex motives (2-2; 2/3-1; 3/4-1; 4-3)

Are bothered by something, rationally or irrationally

are often seeking attention because they feel unappreciated or slighted in some way, or they could have low impulse control

Can be acting out of their own issues, the issues of the workplace, or both.

are not necessarily reluctant to the rules. They may express some demotivation.

often have a reason for doing so, which, if uncovered, can lead to insight

are usually reacting to personal stuff that got triggered by the work situation.

may do so for many different reasons, some positive, some negative

2. **three or more plausible reasons** (3/4-2; 4-1; 4-4; 5-1; 5/6-1)

may do so because they are incompetent, or, on the contrary, too much qualified, or merely because they are in a wrong mood this day.

may be making a mistake, changing their commitment at work, or are concerned with a problem or breakdown in some other domain which has overcome their capacity to maintain their behavioral commitment at work.

sometimes do so for legitimate reasons and do so productively to work toward changing a system

may be extremely creative, may not have the maturity to accept or even understand the social paradigm at work, and then there are those for whom "stepping out of line" is not relevant.

can be acting our of their own issues, the issues at work, or other reasons

3. fair dialog encouraged - both sides get their say (4-14)

need careful and directive management so their behavior can be better utilized for themselves and the organization, but it ain't easy.

should be approached and questioned about what their reasons may be – assumptions should not be made.

what line? We need to work together to establish what we are up to and what standards we agree to.

are redirected or challenged to justify and explain their divergence from the group and how it might affect us all positively

should be talked to in order to understand their motivation. It's not necessarily bad.

should have an opportunity for dialogue w/ their supervisors, to understand the real issues/motives and to work towards resolution.

need to tell me what they think the line is and why and then listen to my reaction.

need talking to and dealing with unless they have a valuable perspective that should be listened to.

4. solution depends on the situation (4-10; 4-13)

I talk with to f out the situation. If for some reason discipline is needed, it is given. If not, I ask if they have learned from the experience and go on.

(?) I don't mean to fence-sit, but it really depends on the situation. If they are endangering the safety of themselves or others, then obviously this cannot be allowed.

unless it is for a good reason or to make a creative contribution, are a problem to be managed, hopefully, for their and the organization's benefit. Otherwise goodbye.

should be given praise or criticism depending on different situations.

deserve to be asked to step back in if they are willing to share their insights, if not, it depends on the severity of their dissidence

5. full analysis necessary before taking action (4-12)

need to be examined individually to see both what the stepping out of lines to them and also what it means for the organization; appropriate action can follow such an analysis.

do so for a reason conscious or otherwise which must be understood before a genuine solution can be found.

are usually considered as "problem employees" BUT what's important is to understand what the circumstances were that caused them to step out of line before a label is put on them

generally know whether they are being constructive or destructive; either way I like to explore their motives.

6. solution should bring out the best in the employee

need counseling immediate, private and oriented toward performance outcomes rather than toward behaviors

can often become valuable team members if given the necessary attention and guidance.

Are very often the ones who are more likely to succeed and should be carefully trained and encouraged.

Should be positively challenged so it doesn't damage their self-esteem. And encouraged to take responsibility for learning from the experience

7. complex/specific consequences (2/3-4; 3-3; 3/4-13; 3/4-14; 4-17)

Will usually face the consequences of their actions they will hear from those who feel compelled to offer an opinion about them.

Are often trodden on despite / because of (?) sometimes having valuable insights into the issue

usually get negatively labeled if they do not return quickly to their "normal" predictable behavior.

usually are very quickly brought back into line by either their peers, subordinates or superiors.

don't always understand that you reap what you sew. If you cut corners or talk badly about people behind their back >it will eventually be exposed.

8. offer new perspective/move the org forward (3/4-21; 4-21; 5-2)

can sometimes be on to something, depending on what their point is; lines are linear after all!

might actually have something to offer that would "forward the action."

sometimes lead the way.

are probably breaking new ground. This can be a good thing!

are part of the whole and are probably expressing some aspect of the overall situation which has not been given attention.

are to be regarded with great curiosity what is it that we can learn from them?

present an opportunity to discover new lines of thought and new things about myself

provide insights and perspective that benefit the culture.

give management its greatest opportunity to move forward.

9. may be offering constructive criticism (4-20; 5-6)

often have something to say, often can represent a problem that affects many but others wont discuss.

are helpful if they contribute constructive criticism about work and how it is done.

10. are change agents **(positive regard for individuality)** (4-5)

Might deserve praise if they are bucking the status quo in order to bring about needed change.

are necessary within degrees to ensure that we do not become a 'clone' factory.

make life uncomfortable, but are sometimes good catalysts for change

providing it is done in a constructive way, should be applauded - stepping out of line implies challenging the system. If organizations do not evolve, they will dissolve.

may need control, but need to be listened to because they may be positive agents for change.

are often those with a real grasp of what needs to be done. And ? who aren't who seek to destroy rather than contribute should be sacked.

may play a vital role in creating a adaptive company

are very often creative and feel the need to express this

should not be censured for they may be generating new ideas

may well be frustrated innovators

should be respected because they have the courage to follow their own drummer

11. either/or – specific and elaborate (3/4-25; 4-19)

Are not looking at the big picture, or are, and want to change things.

Are either courageous, imaginative risk-takers or fools

Are probably very courageous or very stupid unless they have a very good reason

Are heroes or villains depending on the circumstances.

can be great if creative, but annoying if lazy, truculent or selfish

may be either constructive or destructive ... creative or trouble ... it all depends.

may well be justified in voicing things we need to attend to, or may be self-serving.

are usually a nuisance but just sometimes are ground-breakers.

can be total pains or bright sparks it depends.

are probably showing initiative but some are just blowers.

can be total pains or bright sparks – it depends on their motives and expression

12. <u>are non-conformists/system is too rigid</u>

Most likely have some other – perhaps more interesting – idea about what they really should be doing.

are often taking risks which are usually for reasons of principle and challenge the system

are probably doing many of the right things, but the "system" is rarely flexible enough to accommodate them.

maybe have something to their inability or unwillingness to conform

May have realized that the line is not going where they want it to.

13. <u>recognition of multiple perspectives</u>

Do so for all sorts of reasons, some of which may be valid and some of which will have no validity from my perspective.

are not thinking in a line-oriented way. But their managers may be "in-line" thinkers. And that causes problems for both parties.

is a phrase that irritates me, it usually heralds a period if getting one party to see another's point of view.

will usually behave rationally from their perspective.

14. <u>questioning the question</u> (3/4-26; 5-4)

not an easy one to answer. The question assumes too much & explaining how my work situation is on this scale would take too long. Other answers often intentional, sometimes not.

have reasons + should be listened to; I don't know that there is any "line."

it depends on what "step out of line" means.

15. <u>positive assessment (more elaborate)</u> (3/4-24; 4-22; 5-8)

Are sometimes people with the most creativity and self-awareness.

are often more interesting than those who don't.

are sometimes delightful to be with.

are probably more creative and courageous than those who stay in line.

Sometimes surprise me with their couragement [sic] and creativity

16. **Individualized nuanced response** (4-26; 5-5; 5/6-2)

No longer exist because it's just me and my husband, and we are peers so there's no line to step out of; if a client breaks an agreement with me I'll ask him why and find out if there's something wrong, or if I feel he is acting outside the spirit of what we are doing together I'll explore it privately with him and find out what's wrong; if it means we are no longer creating together in a way that supports our mutual well-being and neither of us or anyone who helps us can see a way to correct it I'll end the contract

irritate me and I take that irritation as a challenge to my capacity to remain open

17. **Caution against conventional interpretation**

are generally regarded as trying to get attention, which may not be so

are not necessarily non-conformist or out to cause trouble

Unassigned Compounds:

are often the most creative ones. If they're productive and successful enough, they can get away with it.

Are frustrating but usually reacting to "systems" pressures from the world around them.

are non conformist to the rule and regulations which frustrates those that maintain the status quo.

usually do so for a reason. I think it's important to check out how they are feeling about their work and what precipitated the problem + it's important to set limits, but also important to understand why a limit is not observed.

should have the opportunity to talk with their supervisor about the situation and, depending upon the circumstances, should be given another chance, reprimanded, or in rare instances, fired; however, in my role as supervisor I tend to give people the benefit of the doubt, probably beyond what is justified, before I reprimand.

may have goo reason depending on the situation and each instance should be treated separately to determine if warranted and what if any sanctions should be imposed.

should be asked to justify the breech, and, failing some just cause or good reason for the "misconduct" which may justify it, should be dealt with to correct the problem or irradicate [sic] it if ifs a one time occurrence they may not be a problem, but ongoing misconduct cannot be allowed to go unchecked.

need more time and understanding, careful handling, and can be good feedback agents.

may speak for others, who are perhaps less courageous. They are a "pain in the asse" (!), they disturb the status quo, and are potentially ejected from the system. How interesting, that their replacement often also "steps out of line at work"?

May have a good reason to do so. I try to find out why. Maybe they have a good reason that could ultimately lead to better approach.

may be right to do so, there is no reason to assume the line is drawn in the right place.

are acting out their unhappiness in other areas of life too; the effects of their actions are deeper than I can see and more far reaching than I can ever know or understand.

are often using that situation to act out inner psychological issues which may or may not be related to the workplace; either way inquiry and trust rather than punishment may help transform the behavior.

Unassigned Non-Compounds:
may be brave, stupid, (born) and probably I admire them.

irritate me and I take that irritation as a challenge to my capacity to remain open.

Have to balance their needs for self-expression with the risks to their job and career.

usually deserve recognition for offering up some discretionary potential

are taking a risk and should be respected for it so long as they are fully aware of their objectives to do so.

may vry [sic]well do so if the result is good/creative

it is important for the organization to be able to accept a reasonable amount of diversity.

may well be justified in voicing things we all need to attend to, or may be self-serving

Stage 5 / Strategist (Autonomous)

Responses at this level are beginning to recognize the complexity of people and situations. They realize that things are rarely as simple as they look on the outside. Answers at this level speak of the far reaching causes and effect of current situations. The Autonomous person is also beginning to see that the line is something that can be played with and changed to better meet the needs of the organization.

1. complex causes at various levels **(alternative constructions, reasons and feelings)** (3/4-2; 4-1; 4-4; 4/5-2, 5/6-1)

are either instigating trouble, very bored, or trying to do something to "make a difference."

are often demonstrating that something is wrong in their work situation, personal life, interpersonal relations or that their goals and values about work are different than other people's.

may be acting from a variety of motivations, some due to unresolved issues of their own, others due to genuine inadequacies in the work environment.

usually do so for their won very good reasons: they may or may not be valid, obvious or susceptible to something .

may have very different reasons: inability to cope, intentional reframing, temporary problems, etc.

may be doing so as the only was to draw attention to a concern either with themselves or the system the find themselves in.

may be experiencing incongruity between their value systems and their workplace "reality" and struggling to find a more acceptable balance

may be signaling a real problem with the structure of their jobs or even the organization as a whole; or they may simply be a disciplinary problem

2.   <u>are valuable to any learning or forward looking organization</u>) (3/4-21; 4-21; 4/5-8)

should be handled as valuable contributors to the organization, their motivation should be determined f perhaps they have value to contribute through the instance though they have not previously been provided that opportunity.

Maybe signaling a problem with the organizational system interpersonal or personal problems or a combination of all these.

should be celebrated! They are the precious rebels every organization needs to illuminate underlying problems and opportunities for change.

Can cause considerable inconvenience or even disruption, but they can often initiate a valuable questioning of the values, priorities, and procedures

provide a creative tension which if honored can bring enormous benefit to the organization

need to be encouraged and motivated to do so such that the output can be harnessed into a creative and positive force.

may carry the sign of a forthcoming change in the way the organization functions.

should be prized because they are the ones who show us what we take for granted

3. complex outcomes

> *at the [medical center], when it occurs, leadership steps in and tries to help the person see where they violated their performance agreement and the problem is renegotiated on a win win basis so it, hopefully, will not happen again.*

> *Are allowed to do so for a time – until I am clear whether this is a creative & inspiring act or a selfish demand.*

> *are subject to a range of responses ranging from tolerated/ignored to being dealt with with extreme prejudice! HP has fewer guidelines/models for dealing with this than for rewarding/praise we can be too nice and occasionally too criminal.*

> *Something needs to be adjusted, and the decision of what gets adjusted must be approached with an open mind and a fair heart.*

4. The "line" is determined by society and can be improved/changed **(beginning notion of the line as constructed)** (3/4-26; 4/5-14)

> *are sometimes wrongly punished for their creativity, and rarely helped if they are having problems.*

> *are usually punished individually even though in many cases, it was the underlying system or expectations that were out of line*

> *are very brave or very foolish, depending on your point of view (and depending on what you mean by "step out of line")*

> *may need the reasons "why" considered very carefully they may have a point which might alter the line.*

> *Again, it relates to my view on rules and systems they are man-made, to be changed, improved, and transformed by men/women*

> ***may need to be brought into line or the line requires adjustment to reflect current conditions***

5. speculation and self reflection **(introspective reaction with self-critical elements)** (4-26; 4/5-16; 5/6-2)

> *it makes us more aware of the lines that are being stepped out of and sometimes that's quite a gift*

> *I often find myself intrigued and delighted and wonder what trouble, change, or reaction will occur as a result.*

> *provide an invitation and an opportunity to question my own understanding of "line" and work" as used her - I have often felt compelled to step out of line.*

> ***can really get me exercised till I realize that they are just doing what they know how to do in a system that may not allow for individual self-expression -- when I see that I calm right down.***

> ***at first blush, can get me into a self-righteous mode. Then I think about their point of view and situation and may actually commiserate.***

6. **may speak the truth for all of us who don't dare** (4-20; 4/5-9)

frequently are voicing what many others feel but haven't the personal integrity to express.

7. **Balance of rights and responsibilities of all :**

are often those who succeed, some rightly so, some because they know the "politics" and some because that's one way the company manages its perceived problems [sic]

should be respected and understood but this should be done with due regard for the rights and needs of others

are sometimes torn between doing what they feel to be right and necessary and conforming for the sake of peace and performance

8. **Are being authentic and self-expressive** (3/4-24; 4-22; 4/5-15)

may be trying to give expression to their true selves instead of doing what the company sees as their ideal employee.

should be allowed to "do their own thing" within the widest constraints a good organization can permit

maybe displaying genuine individuality, but on the other hand, they may be taking us all for a ride.

Unassigned Compounds:

should be disciplined and made aware of the effect they have on all of us on staff, that said, I realize how easy it is to get into a punitive mode myself to eliminate tension

usually do so for reason, conscious or unconscious -- so searching for that provides the clues to moving them forward and the group

Could indicate problems with the place of work or the organization, or they could have personal problems, but generally they should not be allowed to adversely affect other employees.

may be in a hurry, may need to say something, may have a problem at home but whatever else, they are certainly a source of knowledge / information / learning to the organization.

may well be struggling in many facets of their life, could have the potential for creative contributions and should be listened to. We may learn much about [back of page] the things which don't normally get talked about by understanding them.

are often true innovators, the visionary leaders. They need to have their ideas and energy constructively managed.

are OK. I try to understand their motivations and be responsive to their needs hopefully, in the short or long run my actions will encourage them to give more willingly.

May be marching to a different drummer and it is important to find out what is going on with them before making any kind of judgments

Unassigned Non-Compounds:
sometimes brave, sometimes foolish, often right, but always interesting.
probably have something interesting and useful to say that we are afraid to hear.
May be justified in doing so but will find less resistance if nonviolent methods are used.

Stage 5/6 / Magician (Construct-aware)

Responses at this level take a very wide view of the situation and fully recognize the existence of various perspectives. Also the Magician is beginning to recognize the constructed nature of reality – this view is also reflected in the responses to this stem. Responses at this level do not take the "line" for granted. In fact, the Magician recognizes that the line is just a construct of society (a figment of our collective imagination, if you will). As a construct, the line is not important in and of itself. Instead, it is our response to the line that is the focus of the Magician. Answers at this level recognize that the employee has several possible complex responses to the line. They also recognize that the solution to the situation needs to account for the views of all people involved and also account for the fact that the line is just a construct. The solutions suggested here are holistic and far-reaching.

Magicians not only recognize the "line" as a construct, but they are also beginning to see the constructed nature of the ego itself. As a result, we see many complex, self-reflective answers at this level.

1. complex matrix
may have a problem or may be in a system that is dysfunctional, or may simply be in a role that is a poor fit for them, or have a boss with "a problem."

might not be aware of their tasks/responsibilities, night not be motivated, might have other priorities, might be rebels ... etc.. (guess that, because I am a French speaker, I don't understand this one as well as the others.)

may well be leading, living their values, being creative or possibly needing the standard [?] held + help to learn something about themselves.

doing it for lots of different reasons, doing the best they can, to be noticed, being immature, etc...

may have something really important to teach everyone else, or they may simply be bloody-minded (gits?) who have never learned to cooperate or live creatively alongside other people and they may be neither of these things!

are often those who care more for the integrity, content, purpose and value of the work itself, than for political nicety and self-promotion. They are vital to a healthy organisation which seeks continuous improvement by recognising and learning from mistakes.

should be encouraged and rewarded for their courage, providing that their motives for doing so were consistent with our core values, mission and the customers wishes.

should be dealt with in a manner which analyzes the reasons for their behavior, demonstrates to them, implicitly or explicitly, why their behavior was deemed inappropriate (if it was, and, if necessary, offers alternative, more appropriate ways to behave.

do so in one of several ways:, They sometimes create positive energy by constructive change that moves the organization forward. They can also create negative energy by destructive behavior that saps organizational strength. It takes the wisdom of many to tell the difference between the two.

are often bringing something to the attention of other people (or the "convention") that is important to know; i.e. if someone defies the accepted chain of command maybe both the chain of command + that person's role need to be examined.

may be signalling a real problem with the structure of their jobs or even the organization as a whole; or they may simply be a disciplinary problem.

will perturb that human system, potentially opening an opportunity to learn something about the values most dominant in it -- if the perturbers are sufficiently aware and interested and thrill seeking to make the inquiry.

are reacting to a feeling of oppression or marginalization which may or may not meet the appropriate validity claims, although the situation warrants investigation nonetheless to discern what may or may not need to be done, and by or to whom.

2.   habits of heart (4-26; 4/5-16; 5-5)

puzzle me. They may be the only ones willing to tell the truth, or they may be feeling squashed by the organization with their creativity or individual talents curtailed. Or they may be incapable of collaborative activity, or etc. I'd need more data.

can usually be helped back into line very quickly if one finds the right "buttons," but my "lines" are very "wide" as pointless constraints stiffle [sic] development.

a kaleidoscope of reactions occur including anxiousness and expectancy, uncertainty and appreciation, dread and relief, hope and belief in the potential of what can unfold in the dialogue we create

may be seeing something I don't, and possibly acting in a responsible and purposeful way for reasons I should try to understand, or alternatively they may motivated by factors that would not command my (or even their own) respect

people who step out of line at work – well, frankly I admire their courage to push at the boundaries, to question the way things are done, to at lest try something different because in the trying is the opportunity for growth of self, others, the organization, the society

feel some need to do this - some prompting from fear which could be something I need to understand and act on, or at least have compassion with - while also setting healthy boundaries around the behaviors that are not acceptable

3. Habits of mind

4. recognition of constructed nature of reality

Sometimes are only that – out of line – and other times can help, by how and when they step, to redefine a more workable + appropriate line.

may know the line exists and may want to move it; may know the line exists and have trouble working with it; may not know the line exists; may see a different line.

can do it because they are mad or geniuses the mad ones do not see the line and eventually trip over it; the geniuses play with the line and will eventually redraw it.

may be starting a new line, prefer dancing to staying in line, or hope to go to the bathroom.

what line? oh yes, the illusion that has been created by calling it "stepping out of line."

present an opportunity to examine the line, their values in stepping out of line, commitments, possibility, what the line is for and perhaps new personnel

… are probably making a profound statement of reaction to how thin the 'line' is

Unassigned Compounds:

take a risk, for better or worse: they stand to draw attention to themselves thereby either fulfilling their better interests or ensuring the annoyance of those who pay their salary. If they keep their job they can be made happier or after they get fired, they can still move on to a happier situation

May need the reasons "why" considered very carefully - they may have a point which are pushing the system either consciously or unconsciously and probably have a point. What is "out of line" anyway? Who decides?

may be doing so consciously or unconsciously as regards relative: risk intent, purpose, selflessness/selfishness it is usually worth collecting data: 1st 2nd and 3rd person, both on process and outcome

are sometimes acting out of idiosyncratic motives or counterdependency, and sometimes responding to stupid or unartful management, and sometimes kindly challenging history. You have to know the context to make a judgment and even then the judgment is filtered by your frame of reference.

are often ones who could easily redefine the work and the lines. I always wonder, "who's line have people stepped out of? who defined and drew the lines? Maybe the line and its drawers need to be changed.

are often the ones with more imagination & insight viewing the wider agenda. Knowing what the frame is & where they move within or without it.

come into two groups for me, those who are implementing difficult things that have to be done for the overall good and some feathers inevitably get ruffled, and then there are those who go out on a limb and I find them contrary to the overall culture and direction of the organization;,; they can be a warning bell with a unique perception or they can just be out of line and need telling to bring back in, or to go elsewhere, not always easy to achieve.

Stage 6 / Unitive

None of the 446 responses provided to the researcher fell into this level; however one response from Cook-Greuter's data was rated at the Unitive level.

It is at the Unitive level where cause, effect and solution become meaningless. People at this stage have shed the Western dualistic way of thinking and have become non-dual in their thinking. It is at this stage where one realizes that not only is the line a construct, but so is the ego itself. As such, the Unitive person feels that it is not profitable to think of causes, effects or solutions. Instead, the person at the Unitive stage looks at the interconnectedness of all things. The Unitive person concerns him/herself with "being" rather than "doing." Answers at this level tend to be profound, almost poetic statements on the nature of humankind.

1. **<u>Universal connectedness</u>**

2. **<u>Fundamental thoughts and feelings about the human condition</u>**

    may or may not have co-created such a line, and it may or may not matter to anyone, since everything is in a context, everything is a concept – whatever it was; it is Perfect

3. **<u>Unitive thought and unique encompassing metaphor</u>**

CHAPTER V

DISCUSSION

Statistical analysis

As part of the research and categorization process a statistical analysis of the data was
completed. Cook-Greuter (1985) found that the total protocol rating (TPR) for most
Westerners fell within the conventional tier (table 1.)

Table VI

Distribution of Tiers - Cook-Greuter (1985)		
Trancendent	Unitive	**~1%**
Postconventional Systems Thinking Creative	Magician Strategist Pluralist	**~14%**
Conventional Linear Thinking Preventative	Achiever Expert Diplomat	**~75%**
Preconventional Reactive	Opportunist Impulsive	**~10%**

This researcher was not able to do an analysis of total protocol ratings due to problems with the data set (described below.) However, she did do an analysis on the distribution of the item scores. The table below shows that for the stem "people who step out of line at work…" The majority of the ratings fell within the conventional tier, as expected.

Table VII

Distribution of Tiers - Research Findings		
Trancendent	Unitive	**0.2%**
Postconventional Systems Thinking Creative	Magician Strategist Pluralist	**30.3%**
Conventional Linear Thinking Preventative	Achiever Expert Diplomat	**65.1%**
Preconventional Reactive	Opportunist Impulsive	**4.5%**

The most significant difference between Cook-Greuter's findings and those of this researcher is that over 30% of the responses in the researcher's data set fell within the postconventional tier. When looking at Cook-Greuter's findings, we see that only 14% or so in her data set achieved a TPR within the postconventional tier.

Some may argue that the researcher is comparing "apples and oranges." Items scores are a different metric than total protocol ratings. However, this researcher would state that such a comparison is useful for validation purposes. If an individual stem is a valid measure of the level of ego development, one would expect ratings for that particular stem to fall out in a similar pattern as that of TPR's. Although the discrepancy found by

the researcher is of little significance, a larger discrepancy might indicate a lack of validity or reliability of that individual stem or the fact that the sample size was too small for proper analysis. Further research on this topic is warranted.

The researcher also analyzed the distribution of the item scores. The mean, median and mode score for the stem was the Achiever stage indicating a normal distribution and a relatively trustworthy data set.

The emergence of categories

In composing the scoring manual, this researcher found an interesting trend in many of the categories. It seems that some categories emerge in simple terms at earlier stages and get more and more developed and complex in later stages. Below are some excerpts from the scoring manual that serve as an illustration of this emergence.

Level 2/3- Category 3

    3. –should be punished

        Must be stopped
        should be walked on'
        must be fired

Level 3- Category 1

    1. **should be reprimanded**

        Must be disciplined
        should be discipline
        should be chastised

Level 3/4- Category 6

    6. should be corrected appropriately

        should be reprimanding [sic] and "punished" accordingly.
        Need to be disciplined appropriately
        should be reprimanded in a rational manner.

Level 4- Category 6

    6. should be corrected in a respectful manner

Should be first praised for their good qualities at work and their problem solve with them to bring them back in line.

need to be taken aside to discuss what they have done in a positive and caring manner in order to get the message through abut at the same time they do not feel bad about whatever they may have done.

deserve to be recognized for their unconventional behaviour and developed to take risks responsibly.

In looking at the above progression one can see that although all responses are in essence saying that the employee needs to receive some kind of punishment or correction, the point of view expands a bit more at each stage. At 2/3 responses are somewhat harsh – almost visceral. The employee must be punished severely. At the Diplomat stage the employee needs discipline, but there is an emergence of the idea that there should be a purpose in the punishment – to get the employee back into conformity with the group. At the Expert level we see that respondents are realizing that there is a right way and a wrong way to go about punishing an employee. Therefore, care must be taken to ensure that the employee is punished appropriately. Finally, in the Achiever stage we see the emergence of an expanded third person perspective that is concerned about the wellbeing of the employee, and therefore, recognizes the need respect the feelings and rights of the employee. The above progression is an excellent example of how we continually expand our perspective to include more and more people as we move through the stages.

Applications to the field of counseling

In the course of completing research for this thesis, this researcher found that ego development theory in general and the SCTi in particular are being used in various arenas. The arena that is of particular interest to this researcher is the arena of counseling. As was stated in chapter two, several articles have been written in relation to the use of ego development theory in counseling (Loevinger, 1980; Swensen, 1980;

Carlozzi et al, 1983; Borders, 1989; Cook-Greuter & Soulen, 2007; Ingersoll & Cook-Greuter 2007).

Swensen (1980) looks at Lewin's (1951) formula that states behavior is a function of the person and the environment. He suggests that clinicians need to assess both environment and the person. The framework he chooses to use in assessing the 'person' is Loevinger's ego development framework. Using Loevinger's stages of development he suggests that the choice of therapeutic intervention should be chosen based on the client's level of ego development. For example, clients at the very earliest stages are more motivated by rewards and punishments and would therefore benefit from a more behavioral approach while clients at the later stages would benefit from a more self-directed type of therapy focusing on self-development. He stresses the importance of assessing a client's level of ego development in order to tailor interventions so the client receives the maximum benefit from that intervention. He also stresses that being at an earlier level of development does not necessarily indicate poor mental health. Therefore, "One goal of therapy may be to help the person live successfully at the stage of ego development at which they now function." (Swenson, 1980, p. 387.)

There are several different theoretical orientations into which ego development theory could fit, but the counseling theory that makes the most use of ego development theory is the Integral model of the self (the self-system) as developed by Ken Wilber (2000). "The integral self-system is a comprehensive model of the self that embraces the relevant research and theoretical understandings of how our self-sense evolves and accounts for much of our experience of the world." (Ingersoll and Cook-Greuter, 2007, p. 193.)

Ken Wilber (2000) uses the metaphor of the ladder and climber to illustrate ego development. The ladder represents the various stages that one moves through as they develop and the climber is the ego itself. As the ego moves from one stage to the next its views and perspectives change just as a climber on a ladder gains a different vantage point each time he moves up one rung. A complete treatment of the topic of Integral counseling is beyond the scope of this thesis; however just as Swenson (1980) believed, Integral theory is based on the premise of "meeting a client where they are" based on their level of ego development.

Limitations of the Study

Problems with the data set

As was mentioned earlier in this thesis, Cook-Greuter and colleagues provided the data for this research. The researcher for this thesis did not have access to the original protocols which means that the researcher had to depend on other researchers for accuracy in demographic data and responses. One significant piece of demographic data that was not provided to the researcher was the native language of respondents. It is assumed that most respondents were native English speakers, but at least one of the responses indicated another language as seen in the following: "…might not be aware of their tasks/responsibilities, night not be motivated, might have other priorities, might be rebels ... etc.. (guess that, because I am a French speaker, I don't understand this one as well as the others.)" It is unknown how many other responders were not native English speakers, nor how the language barrier may have skewed ratings on this stem. Hauser (1976) suggests the verbal fluency does play some role in the scoring process. Loevinger claims that generally answers to protocols get longer and more complex at later levels. It

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is possible that non-native speakers of English could have been placed in an earlier stage because they lacked the skill to successfully communicate complex ideas in English.

A second limitation stemming from the fact that the researcher had no access to the original protocols is possible spelling and grammatical errors which could affect the ratings on this stem. Twelve responses to this stem were flagged as possible grammatical errors. Grammatical errors pose two separate problems. Firstly, it is unknown whether the grammatical errors were in the original or were errors in data entry. Secondly, although the grammatical/ spelling errors often do not interfere with the interpretation of the responses, there are some cases where they clearly do. In the response, "…imitate me. They know what they are doing, and in cases are just trying it out," it is the temptation of this researcher to say that the respondent meant "irritate me," but there is no evidence for such an assumption except the researcher's own intuitive sense. Due to the uncertainty, this response was left uncategorized. Similarly, the response, "should be reminded," if taken at face value, appears to be an incomplete thought (i.e. it poses the question, "reminded of what?") However, this response could be taken as a typographical error. Perhaps the original answer was "should be reprimanded." Because there is no way for the researcher to know for sure, this response was left uncategorized.

Another shortcoming in the data was the fact that the data pulled from Cook-Greuter's draft of the scoring manual had no identifying information. This researcher found 34 responses in the Cook-Greuter data that were identical to responses in the data set provided in chart form. It is possible that these duplicates came from the same participant. However, it is equally possible that some of the duplicates came from other participants. This is particularly possible with common responses such as, "should be

spoken to" or "should be asked why." Because of the uncertainty of the origin of duplicate responses, they were only counted once when tallying the total number of responses.

A final limitation in the data is a simple one. There is very little data for the extreme ends of the ego development scale. Out of the 628 responses, only three were rated as level 2 and only one was rated at level 6. This is an understandable limitation since those from the Western world tend to clump at the conventional tier; however, the lack of data made categorizing items in the preconventional, postconventional and transcendent tiers more difficult.

Problems with the ratings

As was mentioned above, the data was provided to the researcher. Not only was the data provided, but the item ratings were also provided. This researcher attempted to stay true to the ratings provided to maintain the integrity of the data, but there were times when the researcher strongly disagreed with a rating. In these cases, after careful consideration and discussion with the chair of the thesis committee, the researcher changed the rating. In all, 20 of the 627 responses were reclassified. Below is a list of responses the researcher reassigned. You will find the response, the original rating, and the new rating.

Table VIII

Response	Original Rating	Final Rating
should be disciplined	2.5	3
have misunderstood something	3	3.5
irritate me.	3	2.5
need to be listened to and understood.	3	3.5
often have non-work issues.	3	3.5
must go to the back of the line and start all over again!??!	3.5	3
are letting the team down.	4	3.5
Do so for a reason	4	3.5
make others' jobs more difficult	4	3.5
may have a good reason to do so.	4	3.5
May very well have a good reason.	4	3.5
May well have a good reason for their action.	4	3.5
must be stopped.	4	2.5
need to be counseled.	4	3.5
need to be told so and the matter discussed.	4	3.5
will usually have a really good reason for doing so.	4	3.5
Are perhaps being creative.	4.5	4
have an important story to tell.	4.5	4
should be made aware of the impact their actions have on the people around them.	4.5	4
No longer exist because it's just me and my husband, and we are peers so there's no line to step out of; if a client breaks an agreement with me I'll ask him why and find out if there's something wrong, or if I feel he is acting outside the spirit of what we are doing together I'll explore it privately with him and find out what's wrong; if it means we are no longer creating together in a way that supports our mutual well-being and neither of us or anyone who helps us can see a way to correct it I'll end the contract	5.5	4.5

A related rating issue stems from the 34 duplicate responses that were mentioned above. There were five instances where item scores for items in the Cook-Greuter data set did not match the item score in the same response in the primary data set. The table below shows those instances. The first column shows the item scores as given in the primary data, the second column shows the scores as reported by Cook-Greuter and the final column indicates the score chosen by the researcher.

Table IX

Response	Primary data item score	Cook-Greuter Data item score	Final item score
never do it again.	3	2.5	2.5
should receive a big wet kiss on the forehead – assuming that's not what they were looking for in the first place	3	3.5	3
can be acting our of their own issues, the issues at work, or other reasons	5	4.5	4.5
it is important for the organization to be able to accept a reasonable amount of diversity.	4	4.5	4.5
may be signaling a real problem with the structure of their jobs or even the organization as a whole; or they may simply be a disciplinary problem	5.5	5	5

As can be seen, the researcher in all cases except one deferred to Cook-Greuter's data.   In the one instance where the researcher did not agree with Cook-Greuter, the researcher applied rule five and, by default, rated the response at the Diplomat level.

The Categorization of Humorous Responses

Some limitations stem from the researcher herself. Although the researcher attempted to look only at the surface meaning inherent in the responses, there were times it was difficult to remain objective. This was particularly true when the researcher found a response humorous. Humor is somewhat subjective and makes responses difficult to

categorize. Questions that the researcher asked when dealing with humorous responses include:

- What is the quality of the humor (i.e. is the humor "mean-spirited" or "light-hearted"?)

- Was the humor used as an illustrative tool or used simply to avoid responding to the stem?

- Did the respondent intend the response to be humorous?

The answers to these questions are also somewhat subjective; however, thinking about these aspects of humor helped in scoring humorous responses. Below is a list of select responses that the researcher found humorous along with the rating of the responses and the category in which they were placed. A discussion of the researcher's thought process regarding these responses follows:

Table X

Response	Score	Category Name	Category #
are idiots	2.5	are stupid	7
Will have to wait longer for their lunch.	3	suffer immediate and concrete consequences	3
should receive a big wet kiss on the forehead assuming that's not what they were looking for in the first place.	3	Uncategorized	Rule 5
were obviously in the wrong queue.	3.5	Uncategorized	Rule 4
Are best characterized in a variety of comic strips	4	Uncategorized	Rule 4
may be starting a new line, prefer dancing to staying in line, or hope to go to the bathroom.	5.5	Recognition of the constructed nature of reality	4

In terms of quality, this researcher tended to place statements deemed "mean-spirited" in earlier stages while light-hearted responses were placed in later stages. For example, "are idiots" is a response that the researcher found "mean-spirited," while "were obviously in the wrong queue," appears to be more "light-hearted" and is scored accordingly.

It is incredibly difficult and scientifically questionable to guess at the intentions of the respondents, but this researcher still asked herself why various respondents may have chosen to use humor. It seems that some humor was useful in illustrating a point while other humorous responses offered no useable opinion. Humor that was used illustratively was placed in later stages than humor that did not appear to be used illustratively. A response that used humor as an illustration is, "may be starting a new line, prefer dancing to staying in line, or hope to go to the bathroom," To this researcher, it seems that the respondent was playing on the meanings of "line" to illustrate that the "line" is just a construct. Conversely, a response like, "should receive a big wet kiss on the forehead, assuming that's not what they were looking for in the first place," did not seem to this researcher to illustrate anything. As such, the researcher applied rule five of the scoring rules and placed it by default in the Diplomat stage.

The third question regarding the use of humor also forces the researcher to guess at the intentions of the respondent. Humor that appeared to be intentional was given a higher rating than humor that appeared unintentional. For example, "…will have to wait longer for their lunch," is a response that the researcher found humorous, but feels was not intentional. Therefore, the response was taken literally and placed in the Diplomat

stage. Conversely, the response "are best characterized in a variety of comic strips,"

appears to be more intentional and therefore was rated at the Achiever level.

<p align="center">*Future Study*</p>

Further Statistical Analysis

In the course of her research, the researcher began a preliminary statistical

analysis on the themes apparent in the responses in an attempt to discover trends in

thought patterns across the ego levels. She took the four categories identified in chapter

four (cause, solution, effect and assessment) and attempted to place each response into

one of the four categories. The process and its highly intuitive nature are described in

detail in chapter three. Due to the limitations of time and the fact that a great deal of

intuition was required in spite of grammatical cues, the researcher was not able to

complete a full statistically sound analysis. The table below gives the researcher's

preliminary findings. Note that the theme with the highest percentage of answers is

bolded at each level.

<p align="center">**Table XI**</p>

Distribution of Themes Across Levels				
	Cause	**Solution**	**Effect**	**Assessment**
Impulsive	33.3%	0.0%	0.0%	**66.7%**
Opportunist	20.0%	16.0%	24.0%	**40.0%**
Diplomat	0.0%	**47.2%**	25.0%	27.8%
Expert	16.7%	**40.4%**	22.4%	20.5%
Achiever	16.2%	**48.6%**	7.4%	27.8%
Pluralist	11.0%	31.2%	4.6%	**53.2%**
Autonomous	28.6%	26.5%	14.3%	**30.6%**
Magician	21.9%	15.6%	3.1%	**59.4%**
Unitive	0.0%	0.0%	0.0%	**100.0%**
Total	15.9%	**38.4%**	12.6%	33.0%

It is interesting to note that "assessment" was the most common theme at the preconventional, postconventional and transcendent tiers (i.e. Opportunist and above and Pluralist and below) while "solution" was the most common theme in the conventional tier (Diplomat, Expert, and Achiever.) These trends seem to support the theory that those in the conventional tier are critical thinkers, analyzers and "get it done" kind of people. It also supports the theory that those in the postconventional and transcendent tiers are more thoughtful and inward-looking and are less concerned with causes and outcomes. The fact that "assessment" was the most common category at the preconventional stages might be indicative of the fact that those at the preconventional levels are self-focused, which would suggest that they lack the ability to look beyond themselves and their own opinions.

The researcher found the above analysis to be useful in understanding the worldviews of individuals at each ego level. It is hoped that similar analyses could be done for other aspects of the data such as perspective, degree of certainty and beliefs about truth. Ego development theory postulates that as we move through the ego levels, our perspective broadens. At the Opportunist level we are self-focused, while at the Unitive level, our perspective had broadened to the point where we see the interconnectedness of all people and things. The researcher has hypothesized the following progression in the data based on ego development theory (note the bold uppercase X's in this chart and subsequent charts indicate primary occurrences and lower case x's indicate secondary occurrences):

Table XII

Expected Trends in Perspective					
	Self (1st)	Other (2nd)	Group (3rd)	Systems (4th)	Universal (5th)
Impulsive	**X**				
Opportunist	**X**				
Diplomat	x	**X**			
Expert		x	**X**		
Achiever		x	**X**		
Pluralist			x	**X**	
Autonomous			x	**X**	
Magician				**X**	x
Ironist					**X**

The researcher hypothesized trends in degree of certainty (i.e. how sure is the responder that their answer is the "correct" answer) and beliefs about truth (i.e. can we know truth absolutely or not and is it even a relevant question). As with the above hypothesis, the researcher based her ideas on what is known about the process of ego development. Below are the researcher's expected trends for "degree of certainty" and "beliefs about truth."

Table XIII

Expected Trends in Degree of Certianty					
	100%	75%	50%	25%	irrelevant
Impulsive	X				
Opportunist	X				
Diplomat	X	x			
Expert		X	x		
Achiever			X	x	
Pluralist					X
Autonomous				X	x
Magician				X	x
Ironist					X

Table XIV

Expected Trends in Beliefs About Truth					
	black &white	black & white with some grey	all grey	grey with some black & white	non-dual
Impulsive					
Opportunist	X				
Diplomat	X	x			
Expert	x	X			
Achiever		X	x		
Pluralist			X		
Autonomous			x	X	
Magician				X	x
Ironist					X

The researcher hopes that others in the field who are interested in ego development theory and the SCTi would test the above hypotheses using, not just the data from the stem that is the focus of this thesis, but other data from other stems as well. Such a process would be useful for validating the stems and the theory of ego development.

Extensive Field Testing and Revisions

Now that the manual has been constructed, to complete the process it will be necessary to validate the manual. This researcher had planned a validation process, but time constraints prevented completion of this process. It is suggested that the manual be distributed to as many raters as possible for field testing. Along with the manual, they could be given a brief survey to complete which will determine their satisfaction with the newly created item manual. The survey could consist of five to ten questions using a Likert scale. Once surveys and comments have been received, further revisions could be made to the manual.

Throughout the validation process, new data could be added to the data already collected to make the data set stronger. It would be particularly helpful to gather new data for the extreme ends of the ego level scale (i.e. levels two and six).

Causes for Movement from One Ego Level to the Next

During the course of researching the subject of ego development, one question that came up for this researcher was, "what causes movement from one level to the next?" The researcher found some sources that looked at that question. Some suggest that a change in career or religion could play a part in ego development (Bauer and McAdams, 2004.) In a related study, Manners and Durkin (2000) state that although several factors could contribute to ego development in adults, "only two receive [Loevinger's (1976)] clear endorsement: life experiences and cognitive development." (p. 481.) They go on to say that even while considering these two factors, ego development is still not fully explainable. One researcher undertook a study of twins separated at birth to determine

whether there was a genetic component to ego development (Newman and Bouchard, 1998) and found that heredity may in fact play a role in ego development.

The causes for movement from one ego level to another, especially in adulthood, is a subject that may never be exhausted. Researchers have barely begun to unravel that mystery and it is the hope of this researcher that more study will be done on this topic in the future.

Closing Remarks

I hope the reader will forgive me for breaking from standard practice and choosing to write this section in the first person. The reason I choose to break from tradition is that researching and writing this thesis was a deeply personal experience for me. My interest in this subject was sparked when I was given the opportunity to take the SCTi myself. Taking the test and then going over my results with one of the raters gave me tremendous insight into myself and my views of the world. It explained some nagging questions and issues that had been plaguing me.

After that experience, I began to look into ego development theory further. I had the added advantage of studying under Dr. Elliott Ingersoll, who has worked closely with Suzanne Cook-Greuter and is very familiar with ego development theory and the Integral model of counseling. He always encouraged his students to try and "ballpark" the ego level of the clients we saw in order to determine where they are coming from. By knowing where our clients are coming from, we are free to "meet them where they are." When I first learned these concepts, it was difficult for me to conceptualize exactly how to "ballpark" a client's level of ego development and how it would make me a more effective counselor. However, throughout the process of writing this thesis, I have gained

skills and insights into ego development that have allowed me to effectively apply ego-development theory to my work as a counselor.   I believe it has made me not only a better counselor, but a more fully developed person.

It is my hope that some of those who read this will be inspired as I was to study ego development theory further. Study of ego development theory could encourage professional and personal growth. Additionally, as more people study and write about ego development theory, the base of knowledge on the topic will expand and further validate the theory and the measurement thereof.

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