

A Brief Technical Manual
for
THE EDINBURGH QUESTIONNAIRES
(1982 Edition)

A Cluster of Questionnaires for Use
in
Organisational Development
and in
Staff Guidance, Placement and Development

by
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INTRODUCTION TO THE EDINBURGH QUESTIONNAIRES

The *Edinburgh Questionnaires* are intended for use in organisational development and in individual placement, guidance and development. They have been refined over a number of years in the course of research programmes designed, on the one hand, to advance understanding of values, attitudes and institutional structures associated with economic and social development and, on the other, the nature, development, assessment and release of human resources. The development of the methodological framework on which they are based can be traced through the references cited at the end of this Manual.

The final theoretical framework which has been used in the development of *The Edinburgh Questionnaires* has been set down in Raven (1983). This *Technical Manual* provides those administering and completing the questionnaires with a basic understanding of their uses and value, including advice on how to use the information they provide.

What distinguishes *The Edinburgh Questionnaires* from other measures of personal interests and organisational climate is the use of value-expectancy-instrumentality theory (Vroom, 1964; Porter & Lawlor, 1968; Fishbein, 1967) to generate measures of motivation. As is widely appreciated, people's dominant values do not always predict what they will do, because their behaviour is usually influenced by multiple considerations. *The Edinburgh Questionnaires* make it possible to identify a problem or behaviour an individual cares about and then to map both the multiple consequences which the respondent anticipates if he were to tackle the problem or engage in the behaviour, and the value he attaches to each of those consequences. In this way it is possible to obtain a measure of his motivation to engage in the behaviour. This measure is not factorially pure, in the psychological sense. Rather it is a summary index derived from an exploration of the multiple causes of behaviour.

Although this is a unique feature of *The Edinburgh Questionnaires*, each of the *Questionnaires* in the cluster is of value in its own right - particularly in surveying the ability of the work-place to release the creativity, know-how, and initiative of those concerned.

A BRIEF DESCRIPTION OF

THE EDINBURGH QUESTIONNAIRES

The *Edinburgh Questionnaires* comprise a cluster of three questionnaires or sections. Each section deals with different aspects of a central issue.

SECTION 1: QUALITY OF WORKING LIFE

This section is designed to assess individual priorities in the working environment, and the individual's perceptions of the quality of the environment. In the first three groups of questions, respondents are asked to rate the importance to them of each of a number of potentially important factors in their work, and to say how satisfied they are on each count. The final group contains a number of more negative aspects of working

life, and respondents are asked to rate the importance to them of avoiding each one.

Group A: Working Conditions - surroundings, pay, privileges, job security, variety of work, etc.

Group B: Type of Work Wanted - (as opposed to the competencies the individual wishes to exercise) - teamwork, helping people, operating machinery, paperwork, etc.

Group C: Relationships - factors contributing to various types of relationship with superiors, subordinates and colleagues.

Group D: General - negative aspects of work - which the respondent may wish to avoid e.g. worry, unpopularity, organisational constraints.

SECTION 2: IMPORTANT ACTIVITIES

This section assesses the ways in which the respondent wants to behave at work, the competencies he wishes to exercise and the goals he wishes to achieve. A comprehensive list of tasks and activities is provided, the respondent rating the importance to him of having a job in which he can do each thing.

The list is divided for convenience into two sets (1 and 2), each set containing a representative selection of items. The items in each set are divided into two groups, A and B. Group A of each set contains items to be completed only by those respondents who want responsibility for others in the work-place.

SECTION 3: CONSEQUENCES

As will be appreciated from what was said earlier, this is the most important, and most distinctive, section of *The Edinburgh Questionnaires*. It deals with the consequences a person anticipates if he were to set out on a course of action at work, such as tackling a problem. At the outset, the respondent must select a task which is important to him. He is then asked to indicate, firstly, which consequences he feels would result from his efforts and, secondly, which competencies he would be able to bring to bear on the task.

Section 3 is divided into six Parts: Parts A-F contain lists of possible consequences grouped under five headings. These are, respectively:

- A: compatibility of the task with the respondent's self-image;
- B: perceptions of the task and personal reactions;
- C: the expected reactions of superiors;
- D: the anticipated reactions of colleagues and work-mates;
- E: perceived benefits and dis-benefits to others.

Part F - *Competencies Engaged* - contains a list of competencies which the respondent may be able to use to solve his chosen problem. The respondent is asked how well he could do each thing and can indicate those competencies which he feels he would have no opportunity to practise.

USES OF THE EDINBURGH QUESTIONNAIRES

Each of the three sections can stand on its own. However, they are designed to be used together, and when this is done they will yield the maximum amount of information with the greatest value. This should be borne in mind when reading the following summary of uses of each section.

SECTION 1: QUALITY OF WORKING LIFE

- | | |
|--|---|
| <i>Individual Placement</i> | a) It would be irrelevant to ask a newcomer to the organisation to rate levels of satisfaction. However, ratings of importance will establish an individual's priorities with regard to the working environment and help to ensure that he can be placed in a position in which he is likely to be optimally motivated. |
| <i>Individual Placement & Organisational Development</i> | b) The combined ratings draw attention to important areas of dissatisfaction for the individual and, when cumulated, for the work-force. Once identified, these problems can be dealt with e.g. by placing individuals in appropriate posts. |
| <i>Individual Placement & Organisational Development</i> | c) If individual responses are contrasted with the qualities thought important by the majority, the problems meeting the individual can be anticipated, and plans made to alter the general climate of opinion in the work-force, and to place the individual optimally. |
| <i>Staff Guidance & Development</i> | d) Used specifically in conjunction with Section 3, problems and areas of dissatisfaction - and their remedies - can be fully explored. |

SECTION 2: IMPORTANT ACTIVITIES

Essentially, this section assesses the ways in which people want to behave, the competencies they want to exercise and the goals they wish to achieve. (As explained earlier, it cannot be assumed that they will be strongly motivated to do these things.)

- | | |
|--|---|
| <i>Individual Placement</i> | a) Tasks, behaviours and competencies which the individual does/does not value can be identified so that he can be placed in a position which allows him to do as many of the things he values as possible. |
| <i>Staff Guidance & Organisational Development</i> | b) When cumulated, the data will give a clear insight into the organisational climate, identifying types of behaviour the work-force does/does not value for itself, and therefore those which it will/will not esteem in others. These values can be compared with those of management, and steps taken to understand and reconcile differences. |
| | c) The data can be used to indicate a shortfall/excess of people wanting to behave or work in particular ways in individual sectors of the organisation. |

SECTION 3: CONSEQUENCES

Section 3 identifies the consequences an individual thinks will result if he tackles a problem. The individual also makes his own assessment of his capabilities when dealing with it. Used in conjunction with the other sections, Section 3 makes it possible not merely to identify ways in which people wish to behave, but allows an assessment of the likelihood of their actually doing so.

- | | |
|---|---|
| <i>Individual Placement, Guidance & Development</i> | a) Such data will provide an additional indication of preferred activity. Difficulties which an individual thinks he will encounter when he embarks on a course of action can be pin-pointed, and thus it becomes possible to plan an individualised programme of placement and development, so that he can be helped to develop important qualities and avoid being asked to do things which he cannot, or does not want to, do. |
| <i>Staff Guidance & Organisational Development</i> | b) The section provides extensive information on the work-force's subjective abilities to tackle problems which are important to them, and on the compatibility of such behaviour with their own role definitions, and with the role definitions they believe others hold of them. |

The wealth of information *The Edinburgh Questionnaires* provide on personal values, interests, subjective abilities and personal cognitive-affective maps of the consequences of important courses of action is extremely useful for individual guidance, placement and development purposes.

Cumulated over all the work-force, the data has the potential to spur organisations to engage in value-clarification and organisation-development exercises.

Used longitudinally, the questionnaires would permit the credentialling of personal growth and the planning of organisational development programmes, as well as providing evidence of their effectiveness.

ADMINISTRATION

For Individual Guidance,

Placement and Development

If the responses to the *Questionnaires* are to be used as a basis for individual counselling, it is best if the respondent has completed all three Sections. However, if time is a problem, Section 1, Group C, and either Set 1 or Set 2 of Section 2 can be omitted. Section 3, on its own, will often provide a basis for a useful discussion, particularly if it has been completed in relation to a task which is considered important by both the respondent and the employing organisation. A list of important tasks in organisations is included as an appendix to this manual.

For Organisational Self Survey Purposes

The questionnaires have been laid out in such a way that they can be guillotined to yield six separate sheets, each printed on both sides. In the case of the two sheets deriving from Section 1, only one side of the resulting sheets need be completed in order to obtain meaningful data.

Different sub-samples of respondents can be asked to complete one or two of each of the six sub-sets of questions derived from Sections 1 and 2 listed below, plus either Parts A to E, or Part F, of Section 3.

However, if the questionnaires are used in this way the investigator will need two to three times as many copies of Section 3 as of Sections 1 or 2.

The six meaningful sub-sets of sections deriving from Sections 1 and 2 are:
Section 1, Group A; Section 1, Group B;
Section 1, Group C; Section 1, Group D;
Section 2, Set 1; Section 2, Set 2.

For certain purposes, these sub-sets of questions can also be used on their own without all or part of Section 3.

Section 3, Parts A-E and/or F can also be used on their own in relation to a task supplied by the investigator, possibly chosen with the aid of the list of *Important Tasks in Organisations* given in the Appendix to the Manual.

USING THE DATA

In Individual Guidance,

Placement and Development

Although many of the blocks of items have, over the years, been subjected to factor analysis (see Raven & Dolphin, 1978), and although the scores obtained on these factors are related to priorities in education, patterns of satisfaction with education, decisions on the amount of education taken, choice of specialist subject, choice of career, persistence in that career, and productivity in the work-place, the factors have frequently proved to be weakly defined. Furthermore, in order to reduce the work-load on respondents, an effort has been made to retain in the *Questionnaires* only one or

two items from the stronger factors. As a result, the factorial structure of the questionnaires is known to be weak.

Partly for these reasons, and partly because a basic tenet of the theory which has guided the production of the *Questionnaires* is that behaviour is more likely to be determined by multiple, situationally relevant, value-laden, considerations than by a small number of underlying "traits", little is to be gained by calculating a profile of factor scores for respondents. Rather, it is more important to examine the respondent's pattern of perceptions and satisfactions and his perceptions of the probable consequences of tackling the personally important "problem" in relation to which he has completed the *Consequences Questionnaire*.

If it is felt to be worth the effort, an index of the individual's motivation to tackle the problem can be computed by weighting his responses as described in the relevant section below.

In examining the pattern of responses, attention may focus on the type of work and pattern of relationships with colleagues, superiors and subordinates which the respondent wants, and his satisfaction with his opportunity to obtain these requirements at the present time. Particular attention will, of course, be attached to the consequences which the respondent wants to experience.

The consequences which the respondent anticipates if he were to try to tackle one of his problems may be important. Attention should be paid to exploring and resolving value conflicts which the course of action may entail, to helping the person concerned to develop changed expectations of himself and of others, to helping him to develop the abilities which he would need if he is to overcome obstacles which are anticipated, and to trying to place him in situations in which he is supported in doing what he wants to do and likes doing, and does not encounter unnecessary obstacles.

As outlined in more detail in *Competence in Modern Society*, probably the two most effective ways of achieving these goals are, firstly, placing the individual in situations in which he can develop new abilities and changed expectations of himself and of others and, secondly, using individually oriented development programmes of the sort first described by McClelland in 1968.

Competence in Modern Society contains data, collected using earlier versions of *The Edinburgh Questionnaires*, on the frequency with which a small sample of the population chose each answer. These data enable one to discover whether one person's responses are usual or unusual. If he is strongly motivated to do things which it is important for someone in the organisation to do, yet which few people do in practice (assessed either in relation to the general normative data which is available in *Competence in Modern Society* or in relation to normative data collected for the purpose within the organisation) then it may be important to place the individual concerned in a position in which he can capitalise on his interests and motivations, develop necessary abilities and expectations, and

obtain the support of at least a significant number of other people.

If (as would appear, from the limited data available, to be more likely to be the case) his concerns, priorities and expectations are common, but unlikely to enhance the well-being and development of the organisation, care must be taken not to pillory the individual, but to engage in organisational self-surveys, and organisation-development activities as described below.

Weighting Responses

Although a detailed examination of the respondent's perceptions and expectations of the consequences of his actions, and the importance he attaches to those consequences, yields the data which are most useful from the point of view of individual guidance, placement and development, there may be occasions on which it is useful to compute an overall index of the strength of someone's motivation to tackle the problem. A computer programme is being prepared to assist in this weighting process.

Many of the items on the Consequences Questionnaire are paralleled by items on Sections 1 and 2. Thus Item B2 ('I would enjoy this') is paralleled by Item 14 on Set 1, Group B. Item B3 ('I would worry about this') is paralleled by Item 1 on Section 1, Group D. In this way it is possible to see how strongly the respondent wishes to have, or to avoid, many of the consequences he expects.

A complete list of such parallel questions is given in Table 1. Inspection of the importance attached to anticipated consequences gives a clear indication of the respondent's motivation to tackle the problem. The "importance" ratings for those anticipated consequences which are paralleled in Sections 1 or 2 can be summed to obtain an overall index of the respondent's motivation to tackle the task.

Items 1 to 16 of Part F of the Consequences Questionnaire correspond to Items 1 to 16 of Section 1 of the Important Activities Questionnaire. Items 17 to 32 of Part F of the Consequences Questionnaire correspond to Items 1 to 16 of Section 2 of the Consequences Questionnaire. In this way it is possible to discover, firstly, whether the respondent feels he will have an opportunity to exercise the competencies he cares most strongly about if he tackles the problem concerned and secondly, whether he feels that he has the ability to do each of these things. The preliminary data presented in *Competence in Modern Society*, however, suggests that people are not usually deterred from tackling their problems by a perceived lack of opportunity to do things they want to do. Rather, they are deterred by a lack of both the desire and the subjective ability to do the things which they feel would need to be done if they were to be successful in tackling the problem.

In Organisation Development

Data collected by using the *Questionnaires* in organisational surveys has two important uses: firstly, as an input to decisions taken at management level and as a basis for staff discussion at group meetings; secondly, as a basis for monitoring the effectiveness of organisation development and staff guidance, placement and development programmes implemented within the organisation.

Exploration of the implications of the data, summed across the members of a work-force or some sector of it, can draw management's attention to attitudes, beliefs, perceptions and expectations, or failures in staff guidance, placement and development which it is important to do something about. Frequently, that action will involve group discussion with the work-force, exploration of the probable consequences of the data so obtained for the organisation itself and for those who work for it. *Competence in Modern Society*, and some of the derivative publications, contain summary data of this sort, a discussion of its implications, and a discussion of the ways in which it might be used in organisational development. Unfortunately, it is not yet possible to provide case studies illustrating the use of the data in organisation development. The author hopes that those who use the questionnaires on a trial basis will contact him, so that the data base can be extended and so that case histories of its uses and consequences can be developed.

ADDRESS FOR CORRESPONDENCE

As has been indicated, those preliminary versions of the *Questionnaires* have been published so that the normative data base can be extended, so that case history material concerning their usefulness can be accumulated, and so that the *Questionnaires* can be refined. The author hopes that those who use them will share their data and experiences with him.

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IMPORTANT TASKS IN ORGANISATIONS

Table 1
Locations of Importance Ratings
for Consequences Items

(Score all "Part A" items as +1)

CONSEQUENCES	IMPORTANCE	CONSEQUENCES	IMPORTANCE
PART B: PERSONAL REACTIONS	STATION/ GROUP	PART C: (CONT'D)	SECTION/ GROUP
* B1	1B	C12	1D
B2	1B	C13	1C
B3	1D	PART D: REACTIONS OF COLLEAGUES	
B4	1B	D1	1D
B5	1D	D2	1C
B6	1B	D3	1D
B7	1D	D4	1C
B8	1B	D5	1D
B9	1D	D6	1D
B10	1B	D7	1D
PART C: REACTIONS OF SUPERVISORS		D8	1C
C1	1A	D9	1D
C2	1A	D10	1D
C3	1D	D11	1D
C4	1D	PART E: BENEFITS & DISADVANTAGES TO OTHERS.	
C5	1B	E1	1B
C6	1D	E2	E2
C7	1D	E3	1D
C8	1B	E4	E4
C9	1D	E5	1D
C10	1C	E6	E6
C11	1C	E7	1D
		E8	E8

GROUP 1

- a) You tried to get your superiors to let you make more decisions on your own, so they did not need to check or authorize them so much.
b) You tried to assume responsibility for implementing changes which had been suggested by you.

TAKING RESPONSIBILITY

USING INITIATIVE

- a) You spent time researching a topic which you thought would be particularly useful to your organization, although you had not been specifically asked to do this.
b) You decided not to do some of the work you are expected to do in order to make more time to think about the goals of your organization and what should be done to achieve them.
c) You tried to move yourself into a position in which you could make full use of your capabilities.

GROUP 3

- a) You tried to introduce a new product, new service or technical innovation which you were certain would benefit the organization.
b) You tried to reorganize your department, office, work, etc., so that it would run more effectively.

INNOVATING

EVALUATING AND TAKING CORRECTIVE ACTION

- a) You spent time following up the effects of changes which had been introduced and trying to get decisions modified as a result of information collected and observations made.
b) You tried to get a decision revoked because you found that it was not, after all, in the company's best interest.

GROUP 5

- a) You tried to establish a new, and in your opinion, better, system of regular reviews of staff progress, involving assessments of their interests, so that these could be used to the maximum benefit of themselves and the organization.
b) You encouraged members of staff from all levels in your department (action) to participate in making assessments of each other.

ASSESSING OTHERS

GROUP 6

- a) You encouraged your subordinates to tell you about personal and organizational problems which prevented them from working as well as they might.
b) You tried to advise a subordinate or colleague who was unpopular so that he would have fewer difficulties at work.

HELPING OTHERS TO SOLVE PROBLEMS

GROUP 7

- a) You tried to find out, from your subordinates, what their interests, strengths and weaknesses were, so that they could be moved into positions where they could make best use of their abilities.
b) You tried to get everybody to share responsibility for noticing the strong and weak points of their colleagues, so that the best person for a job is given the opportunity to do it.
c) You tried to improve the competence of your subordinates by sharing your expertise, making sure that your subordinates had an opportunity to see how you do things, and by moving them into positions in which they could develop new skills.
d) You tried to find ways in which individuals or groups who had previously been thought incapable of contributing very much could in fact do so.

FACILITATING DEVELOPMENT

- GROUP 8** ENSURING THAT OTHERS ARE INFORMED
 a) You kept your subordinates fully informed about impending changes or problems.
 b) You gave your subordinates a true account of all the reasons which influenced your decisions.
- GROUP 9** ENCOURAGING OTHERS TO PARTICIPATE/CONTRIBUTE
 a) You tried to get all colleagues and subordinates to participate in clarifying the goals of your section (dept., office) and working out the best ways to achieve these.
 b) You gave subordinates a say in all decisions.
 c) You tried to make sure your subordinates feel more capable of tackling important problems.
- GROUP 10** ENCOURAGING INITIATIVE
 a) You decided not to define a newcomer's work precisely, but instead encouraged him to create his own job.
 b) You implemented a plan which would give your subordinates/juniors the opportunity to put forward and receive recognition for new ideas and improvements.
- GROUP 11** DEVELOPING TEAMWORK
 a) You tried to develop teams of people with different abilities, so that each had different strengths to offer.
 b) You tried to develop teams of people in which one person's defects are compensated for by another person's strengths.
 c) You tried to get a group of people who did not get on well together to work effectively as a team.
- GROUP 12** ENLISTING THE HELP OF OTHERS
 a) You asked colleagues and subordinates to help you with a particular task which was your responsibility, but which you felt would benefit from pooled knowledge.
 b) You tried to get your colleagues to work together with you at a task which you all thought was important but which was no-one's particular responsibility.
 c) You admitted your own weaknesses and sought the assistance of other people in these areas.
- GROUP 13** DELEGATION OF RESPONSIBILITY
 a) You gave subordinates responsibility for important decisions.
 b) You gave a subordinate responsibility for an important piece of work, although you would be answerable for the result.
- GROUP 14** SHARED LEADERSHIP
 a) You put a lot of energy into trying to keep a discussion group (working group, committee, union) or which you were a member focused on its main goals instead of being distracted.
 b) You tried to introduce a sense of perspective when a group of which you were a member was getting itself worked up over someone's behaviour.
- GROUP 15** PERSUADING OTHERS TO ACT RESPONSIBLY
 a) You tried to persuade a colleague to behave more responsibly.
 b) You tried to persuade subordinates to act with the best interests of the organisation in mind.
- GROUP 16** PERSUADING OTHERS TO CONSIDER DIFFERENT POINTS OF VIEW
 a) You tried to get more people to accept your point of view on a question you cared about.
 b) You tried to get people to explore the possible merits of a suggestion instead of seeking to discredit it.
 c) You tried to encourage people to ask questions such as "Is this something I should be thinking about?" when a suggestion is made instead of questions such as "Has this come up through the right channels?"
- GROUP 17** PERSUADING SUPERIORS TO MAKE IMPROVEMENTS, SOLVE PROBLEMS
 a) You tried to persuade your organisation to try out a new (and in your opinion better) way of doing things.
 b) You tried to persuade your organisations to do something about problems which (in your opinion) would be major barriers to future development.
 c) You tried to influence decisions by discussing the problem with each of your colleagues and by encouraging them to discuss it among themselves.
 d) You encouraged your colleagues to analyse the forces from outside the organisation which prevented it functioning more effectively and how they might get more control over these.
- GROUP 18** PERSUADING SUPERIORS TO LET YOU MAKE IMPROVEMENTS, SOLVE PROBLEMS
 a) You tried to persuade your organisation to let you have time to study better ways of meeting its clients' needs.
 b) You tried to persuade your superiors to let you do something about a problem which you had brought to their notice.
- GROUP 19** PERSUADING SUPERIORS TO TRUST YOUR JUDGEMENT
 a) You tried to persuade superiors to introduce changes or developments which you believe to be more important but which you had to justify on the basis of opinions and observations rather than facts.
 b) You tried to persuade your superiors to let you spend all your time for a period thinking about and researching a problem which you believed to be important.
- GROUP 20** IDENTIFYING PROBLEMS
 a) You tried to develop a better understanding of why things were not going more smoothly.
 b) You tried to develop a better understanding of the unexpressed views and assumptions which lay behind opposition to development.
- GROUP 21** ENCOURAGEMENT AND RECOGNITION
 a) You tried to ensure that any extra effort or personal contribution which your subordinates had made were appreciated, known to your superiors, and known to their workmates.