

Benchmark of Organizational Emotional Intelligence (BOEI™)

Benchmark of Organizational Emotional Intelligence (BOEI™)

Technical Manual

Steven J. Stein, Ph.D. and MHS Staff



MHS

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Author's Preface

The *Benchmark of Organizational Emotional Intelligence (BOEI™) Technical Manual* describes a powerful new instrument designed to measure the level of emotional intelligence (EI) in an organization as a whole and in its parts.

Emotional intelligence has been found to be directly related to group and individual performance, leadership skills, interpersonal/social relationships, and the ability to manage change. The BOEI assessment represents an innovative approach to organizational assessment in that it recognizes how the different dimensions of EI at an *organizational level* contribute to success. The BOEI measures an array of factors ranging from a workplace's basic needs to its ideals for optimal performance.

The BOEI survey is a valuable tool in assessing various fundamental areas of organizational effectiveness. Results help target areas of greatest leverage to optimize organizational performance and growth. The aim is to help leaders and key decision-makers identify "blind spots" in the organization by using the assessment and then applying the development strategies as an integral part of their development program.

I would like to hear about your experiences with the BOEI. Research-related comments can be sent to r&d@mhs.com, while other feedback can be sent to customerservice@mhs.com. Only with your input can we realize the full potential of the study and measurement of organizational emotional intelligence.

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Chapter 1

Introduction

Top-performing organizations recognize that their employees are their most important asset, and that developing their people and the overall organizational environment translates directly into an improved bottom line. Increasingly, organizations are realizing that the key to maximizing their competitive position in the market requires paying attention not only to the needs and satisfaction of their employees, but also to the organizational culture as a whole. By responding to individual and group feedback, smart organizations are boosting emotional well-being and increasing productivity. The Benchmark of Organizational Emotional Intelligence (BOEI) is designed to be an important step in that process.

Emotional intelligence has been found to be directly related to group and individual performance, leadership, interpersonal/social relationships, and the ability to manage change (e.g., Bachman, Stein, Campbell, & Sitarenios, 2000; Bar-On, 1997; Bar-On & Parker, 2000; Carmeli, 2003; Day & Carroll, 2004; Goleman, 1995; Higgs, 2004; Higgs & Aitken, 2003; Mayer, Salovey & Caruso, 2000; Rapisarda, 2003; Salovey & Mayer, 1989; and Stein & Book, 2003). The BOEI survey represents an innovative approach to organizational assessment in that it recognizes how the different dimensions of organizational emotional intelligence contribute to success.

The BOEI is an organizational survey designed to measure the level of emotional intelligence (EI) in an organization as a whole and across departments, teams, or divisions. An individual's emotional intelligence has been identified as an important part of a person's ability to successfully contribute to an organization's success (Bar-On, 1997; Bar-On & Parker, 2000; Goleman, 1998; Stein & Book, 2003). While there are several definitions of *individual* emotional intelligence, all share the themes that include awareness of one's emotions, the ability to recognize emotions in others, the understanding of emotions, and the ability to manage one's own and others' emotions. *Organizational* emotional intelligence refers to similar abilities at the organizational or cultural level, and is more than the sum of the individual emotional intelligence levels of those within the organization.

Organizational emotional intelligence is defined here as *an organization's ability to successfully and efficiently cope with change and accomplish its goals, while being responsible and sensitive to its employees, customers, suppliers, networks, and society*. Research has identified a number of factors that contribute to the EI of an organization.

The BOEI survey is designed to provide individual results that compare employees' own scores against those of their workgroup and the organization as a whole. In this way, individuals can learn the degree to which they "fit" and how their thoughts and feelings compare to others within the organization. For some people, this may be the start of an individual development plan within the organization; for others, it may provide confirmation that others share their concerns and provide the impetus for positive organizational change.

Features of the BOEI™

The BOEI combines the assessment of organizational and management issues with an assessment of the social and emotional climate. The BOEI:

- Measures critical aspects of organizational emotional intelligence
- Assesses the key performance drivers: Job Happiness, Compensation, Work/Life Stress Management, Organizational Cohesiveness, Supervisory Leadership, Diversity and Anger Management, and Organizational Responsiveness
- Produces a detailed profile of an organization's emotional intelligence, including areas of strength and weakness
- Offers flexible reports for comparing custom groups within the organization
- Gives specific strategies for development at individual and organizational levels
- Can be completed in a web-based or paper administration and is scored online
- Consists of 143 items that take 30 to 45 minutes to complete
- Is customizable: up to 10 customized, rated items and 2 open-ended items can be added to the questionnaire
- Demonstrates excellent scale and subscale internal reliabilities
- Has a normative sample comprising 759 people in various employment sectors from countries around the globe

The BOEI survey provides an excellent means of identifying potential areas for improvement and can be used as a progress measure to assess the effectiveness of organizational development programs. Acting as a thermometer to gauge strengths and weaknesses in various aspects of workplace effectiveness, the BOEI survey makes it easy to formulate improvement strategies. Organizations will benefit from employee feedback and insight when planning their future.

Traditional vs. Emotional Intelligence

Psychologists have been trying to define intelligence for many years, and there still is no one widely accepted definition. Traditionally, tests of intelligence have been aimed at assessing cognitive capacity, which is basically the ability to learn new things, recall information, think rationally, solve problems, and apply knowledge. However, cognitive intelligence is but one aspect of general intelligence. Intelligence refers to an aggregate of abilities, competencies, and skills that represent a collection of knowledge used to cope with life effectively. An individual's intelligence is therefore comprised of more than simply memory and logic.

While cognitive intelligence is thought to relate primarily to higher order mental processes like reasoning, emotional intelligence focuses more on perceiving, understanding, and applying emotional and social content, information, and knowledge. It has also been suggested that an additional, fundamental difference between the two may be that cognitive intelligence is more *strategic* in nature, meaning it is focused on long-term planning, while emotional and social intelligence is more *tactical*, meaning it is suited for immediate action, adaptation, and survival (Bar-On, 1997; Goleman, 1995; Stein & Book, 2003).

Although the term "emotional intelligence" was first used by Leuner in 1966, it was first formally defined by Salovey and Mayer (1989). The general concept was described in 1920 by Thorndike, while the construct itself was first scientifically studied in the 19th century (Darwin, 1872). Like cognitive intelligence, emotional intelligence is difficult to define. While experts often disagree on its precise meaning, they generally agree that it involves the ability to understand and manage emotions. Broadly speaking, emotional intelligence addresses the emotional, social, and survival dimensions of intelligence, which are often more important for daily functioning than the more cognitive or mental aspects of intelligence. Emotional intelligence is concerned with understanding oneself and others, relating to people, and adapting to and coping with the immediate surroundings.

It is, therefore, not surprising that emotional intelligence represents a very important facet of general intelligence and is directly related to workplace performance. Studies by Cherniss and Goleman (2001), Jae (1999), Law, Wong, and Song (2004), and Stein and Book (2003), illustrate the relationship between an individual's emotional intelligence and his or her career success. The next logical step is to ascertain whether the same relationship exists for emotional intelligence at the organizational or collective level.

What is Organizational Emotional Intelligence?

Organizational emotional intelligence is defined here as *an organization's ability to successfully and efficiently cope with change and accomplish its goals while being responsible and sensitive to its employees, customers, suppliers, networks, and society*. Organizational emotional intelligence combines both strategic and tactical elements and can be measured by assessing transactional and transformational variables. Transactional variables are conventional rewards and punishment used to gain compliance, while transformational variables include behaviors that are geared to change or transform individuals within the organization. (For theoretical background information about organizational emotional intelligence and the BOEI, please refer to chapter 5.)

The organization itself reflects a culture that is larger than the sum of its parts. This culture can be positive, negative, or neutral in terms of its ability to emotionally bond with people. The organization must be seen as a place that is fair to its people, optimistic in its outlook, courageous in its dealing with adversity, and as a learning environment where there is opportunity for people to grow. When people feel stifled in these areas, motivation and performance can suffer. On the other hand, an organization that encourages these values usually has the commitment of its people.

Organizational EI:

An organization's ability to successfully and efficiently cope with change and accomplish its goals while being responsible and sensitive to its employees, customers, suppliers, networks, and society

The Impact of Emotional Intelligence on the Organization

Organizational emotional intelligence involves people's feelings and thoughts about the work they do, their co-workers' and supervisor's behaviors, top leadership, and the organization itself. These feelings, thoughts, and behaviors can have a significant impact on the ability of both individuals and organizations to meet their goals.

Top leadership impacts an organization through its guidance and direction. Leaders steer the organizational ship through calm and rough seas to its destination. Employees need to feel that they understand the mission or destination of the ship. They need to know that resources are being adequately and efficiently used, that the organization is going in the right direction, and that leaders are competent in their decision making and have the best interests of the organization as a whole as a guiding principle. When people have these assurances about their leadership and know where they fit into the overall plan, they feel better about their contribution to the organization. When leaders are found to be uncaring, self-centered, uncommunicative, arrogant, or lacking in integrity, the organization is deflated and work motivation suffers.

A manager's supervisory skills can significantly impact the work of direct reports. When a supervisor poorly manages employees by not supporting them, giving inadequate feedback, and making unrealistic demands, staff can become demoralized and their performance may suffer. When people feel they are being managed badly, regardless of the reality of the situation, they are less likely to be positive about their work. Alternatively, when employees feel they are supported by their supervisor, that attention is given to their concerns, and that their ideas are considered, they are more likely to be motivated and contribute significantly to the organization. Studies have found that the primary reason people leave organizations is because of their supervisor (Kottke & Sharafinski, 1988; Stinglhamber & Vandenberghe, 2003). Thus, the effectiveness of management is highly related to staff turnover.

Similarly, working with others that you get along with can enhance outcomes at work. If a team is dysfunctional, or if people do not get along, there are likely to be negative feelings and behaviors such as anger, aggression, and subversion that can interfere with productivity. If, on the other hand, co-workers or team members feel positively about and support each other, higher levels of cooperative behavior will enhance problem solving, coping, and other key performance drivers.

People's feelings about the work they do can affect the way in which they carry out their jobs. People who are bored at work, for example, are less likely to be efficient than those who are energized and excited about what they are doing. People who feel they have accomplished nothing at the end of the day are less motivated than those who feel they have successfully accomplished what they set out to do.

What is the BOEI™?

The BOEI survey comprises 143 items and employs a 5-point Likert scale with a response format ranging from "Strongly Disagree" (1) to "Strongly Agree" (5). A sixth response option, "Not Applicable" (NA), allows each item to be skipped if it does not apply to the respondent. Responses are combined to render a Total BOEI score, 7 scale scores, 14 subscale scores, and 2 validity scale scores, as shown in Table 1.1.

Table 1.1
BOEI Factor Structure

Scales		Subscales	
Job Happiness	(JH)	N/A	
Compensation	(CO)	Pay	(PA)
		Benefits	(BE)
Work/Life Stress Management	(WL)	Stability	(ST)
		Stress Management	(SM)
		Work/Life Balance	(WB)
Organizational Cohesiveness	(OC)	Coworker Relationships	(CR)
		Teamwork	(TW)
Supervisory Leadership	(SL)	N/A	
Diversity and Anger Management	(DA)	Diversity Climate	(DC)
		Gender/Racial Acceptance	(GR)
		Anger Management	(AM)
Organizational Responsiveness	(OR)	Training and Innovation	(TI)
		Optimism and Integrity	(OI)
		Courage and Adaptability	(CA)
		Top Management Leadership	(TL)
Positive Impression	(PI)	N/A	
Negative Impression	(NI)	N/A	
Total BOEI	(TB)	N/A	

N/A = Not Applicable (i.e., no subscales).

Full descriptions of these scales and subscales are found in chapter 4. Raw scores are computer-tabulated and automatically converted into standard scores based on a mean of 100 and standard deviation of 15 (like IQ scores). Using flexible reporting, results can be generated for individuals, groups, and the entire organization. Report options are further detailed in chapter 3.

Application of the BOEI™

The BOEI survey is a valuable tool for assessing various fundamental areas of organizational effectiveness. Results help target areas of greatest leverage to optimize leadership potential and performance. The aim is to help leaders and key decision-makers identify “blind spots” in the organization and then apply the development strategies as an integral part of their development program.

This survey is also particularly useful in team building. A large part of effective teamwork is based on becoming more aware of the group’s strengths and weaknesses, and then leveraging the strengths as well as strengthening, or compensating, for the weaknesses. Moreover, pinpointing and sharing group results can prove to be a bonding experience that unifies, synchronizes, and strengthens the group as a whole.

The BOEI can also be used to evaluate the ongoing functioning of departments during critical periods of the organizational lifecycle, for example before, during, and following mergers and restructuring. Detailed BOEI feedback can help HR/OD personnel create tailor-made training programs designed to strengthen the emotional and social functioning of groups during these periods; such an approach can help organizations reap maximum benefit from periods of change and eventually thrive.

It is recommended that the BOEI be used as a part of a larger evaluation process together with other assessment methods and collateral information, such as individual and group interviews (from management to front line), results of various organizational performance measures, and behavioral observations, when available. Moreover, the BOEI results should be viewed as the starting point for further exploration of the issues by additional methods to give a more balanced and broader picture of the organization being assessed.

Target Population

The BOEI survey can be administered to working adults over 18 years of age. There is no upper age limit. The English reading level has been assessed at the North American ninth grade level using the Dale-Chall formula (Chall & Dale, 1995; Dale & Chall, 1948). Participants who are a few months younger than the recommended age guideline are still likely to generate reasonably accurate results. The further the deviation below the minimum recommended age, however, the higher the potential for less valid results.

It is not recommended that the BOEI survey be completed by people who are unwilling or unable to respond honestly to a questionnaire. It is also not recommended that this instrument be completed by individuals who are disoriented or severely impaired in such a way that it would have a negative effect on their ability to respond. You may wish to read the items aloud to participants with poor reading ability or whose native language is not English. However, if any such deviation from the standard protocol is used, it should be documented in the administration record.

User Qualifications

The BOEI survey must be administered and interpreted by an appropriately qualified individual. The BOEI is a B-level assessment, which requires that the user has completed courses in tests and measurement at a post-secondary level or has received equivalent documented training. Qualified users of this instrument include professionals such as human resource and organizational development specialists, organizational psychologists, and other consultants who specialize in organizational development.

It is important to bear in mind the distinction between being able to administer the BOEI, and being able to interpret the results. While a thorough reading and understanding of the procedures described here is usually sufficient to administer this instrument, it is not considered sufficient to interpret the results.

Who Can Administer the BOEI?

Individuals without formal training in psychometrics or organizational development can administer the BOEI under the supervision of a qualified user, but they may have difficulty interpreting the results. The administrator must be familiar with the concepts and procedures for obtaining informed consent, avoiding bias, and debriefing respondents. He or she must be able to address the respondents’ questions and concerns surrounding human rights and discrimination, as well as address any skepticism regarding psychometric tests, surveys, confidentiality, and the psychometric properties of the inventory.

Who Can Interpret the BOEI?

BOEI results must be interpreted by a qualified human resource professional, organizational development specialist, organizational psychologist, or other trained professional who is familiar with the principles of testing and psychometrics (including assessment and feedback procedures), and who understands organizational behavior.

Cautionary Remarks

The Ethical Guidelines of the American Psychological Association (AERA, APA, & NCME, 1999; APA, 2000) should be adhered to when using the BOEI survey. In addition, all necessary precautions should be taken to safeguard the confidentiality of the results and the privacy of the participants. The primary user of this instrument is responsible for ensuring that the results are communicated properly. The user should also be aware that the various states/provinces and countries differ in the legal definition of confidentiality with regard to the distribution and the use of test results. It is the primary user's responsibility to be familiar with the laws governing the judicial district in which the BOEI is being used.

MHS assumes no responsibility for the unethical use of the BOEI, whether with regard to the administration of the assessment or the interpretation and use of the results.

Contents of this Manual

This Technical Manual provides information essential for proper administration and use of the BOEI in an organizational setting. Chapter 2 discusses BOEI formats, planning and setting up assessment groups, administration guidelines and procedures, and encouraging participation. In chapter 3, each of the three report types is detailed, and examples of how to combine and optimize reports to maximize feedback are provided. Chapter 4 provides a full description of each BOEI scale and subscale, and demon-

strates how to interpret results using guidelines and two comprehensive case studies. The BOEI's theoretical background is discussed in chapter 5, which builds the case for the assessment of organizational emotional intelligence. This chapter provides a brief history of organizational surveys and explores the relationship between job satisfaction, motivation, and performance. It also includes the theory behind EI, EI in the workplace, organizational EI, and studies linking EI concepts to performance and job satisfaction. Psychometric and normative data are detailed in chapter 6, along with detailed development information. Each of the BOEI scales and subscales are defined through recent and historical research, providing the scientific basis for each component of the BOEI. Concluding comments in chapter 7 explore areas for future research.

There are several appendices to assist you in administering and interpreting the BOEI. Appendix A is a handy pre-administration checklist that you can use before each organization is assessed. Appendix B provides sample instructions to be given to respondents prior to completing the BOEI. Appendix C provides an overview of the MHS Scoring Organizer process (note that complete instructions are available in your Getting Started with BOEI Guide). The BOEI items and scale composition are illustrated in appendix D for your reference. Appendix E provides excerpts from sample reports, including an Organizational Report, a Group Report (by department), and an Individual Report, in order to help you plan and select reports that are tailored to the needs of the organization being assessed.

