Emotional Quotient Inventory v. 2.0 (EQ-i® 2.0)

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User's Handbook

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Please note, the information provided in this version of the User's Handbook is the most relevant and accurate at the time of release and is subject to change without prior notice. All changes will be communicated to end users via EQ-i 2.0 Resource Center at http://ei.mhs.com.

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Publisher's Preface

MHS is proud to announce the release of the EQ-i® 2.0. The original EQ-i®, first published in 1997, was the first commercially available assessment of emotional intelligence and is the global leader, setting the standard for emotional intelligence assessments. Since its release, the EQ-i has been translated into more than 30 languages around the world. The EQ-i 2.0 is the newest and most exciting revision to date; not only is it a refinement of its world-renowned predecessor, it also boasts a number of unique features that cannot be found in any other assessment of its kind.

The EQ-i 2.0 is a comprehensive and valid assessment tool that, in conjunction with other sources of information, provides a rich foundation for personal and professional development, competency modeling, and star performer analyses. Perhaps one of the most unique features of the EQ-i 2.0 is its customizability, allowing coaches and consultants to choose from a variety of features that can enhance the feedback process, level of professionalism, and degree of visibility in the market place.

This revision of the EQ-i has resulted in products that are more intimately connected to personal and professional development, while reliably predicting the most relevant aspects of successful performance across a variety of domains. Modifications to the response set, items, subscales and composite scales have resulted in a tool that is more face valid, with greater usability. The normative data have been updated to more accurately represent the North American landscape, with particular attention to age, gender, race/ethnicity, education, and geographic locations.

For nearly 15 years, the EQ-i - the culmination of Dr. Reuven Bar-On's life's work - has been at the forefront of emotional intelligence in both academic and popular press, while leading the way in professional coaching circles. The EQ-i 2.0 is a product of the continued evolution of emotional intelligence and continues to reflect the essence of the EQ-i and the contributions of Dr. Bar-On. We are proud to have the opportunity to contribute to the advancement and accessibility of emotional intelligence as a construct and emotional intelligence assessment while supporting the development work of so many great professionals.

MHS would like to acknowledge the outstanding contributions of Derek Mann, Gill Sitarenios and Katie Ziemer, who worked diligently on the development of the EQ-i 2.0. They managed a complex, multi-layered project, and translated an enormous amount of information into a tool that would be of the utmost utility to coaches and HR professionals around the world. Their devotion to the project and incredible attention to detail helped ensure that this iteration of the EQ-i maintained and even surpassed the highest quality standards.

We would like to hear about your experiences with the EQ-i 2.0; your feedback is welcomed and will continue to help refine and enhance the assessment. Please send any questions or comments to r&d@mhs.com. We also invite you to visit the MHS website at www.mhs.com to find out about our other innovative products.

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About the Originator

Reuven Bar-On, Ph.D.

Dr. Bar-On is a world renowned expert and pioneer in the field of emotional intelligence. After embracing a need to better understand why some succeed in obtaining and maintaining better psychological well-being than others, and why some are better able to achieve greater personal and professional success, Dr. Bar-On embarked on a journey to define, measure and apply the various aspects of what we now refer to as emotional intelligence. Since Dr. Bar-On's seminal work in 1980, the "Bar-On model" of emotional intelligence has been described as one of three leading approaches to emotional intelligence (Spielberger, 2004). After coining the term "E.Q." ("Emotional Quotient") in 1985 to describe his approach to assessing emotional and social functioning, he later published the first psychometrically valid and reliable assessment of emotional intelligence, The Emotional Quotient Inventory (EQ-i; 1997). The EQ-i has since been peer-reviewed in the Buros Mental Measurement Yearbook and served as the catalyst for more than 200 research and applied manuscripts worldwide with more than one million administrations of the tool.

The work of Dr. Bar-On has helped change not only the testing landscape but that of applied psychology. The development of the EQ-i 2.0 is only made possible by the immeasurable contribution to the psychological sciences of Dr. Bar-On.

Acknowledgements

The revision of the EQ-i® was an enormous undertaking, one that could not have been possible without the collaborative efforts of many to achieve one common goal; enhance the EQ-i, while maintaining the integrity of Reuven's vision and the underlying tenets of the EQ-i. The global interest in emotional intelligence has exploded since the release of the EQ-i in 1997 resulting in a depth and breath of information far exceeding what anyone could have imagined. The team at MHS has reached out to over 700 consultants, researchers, and practitioners in an effort to gain the greatest insight into the strengths of the EQ-i as well as areas that provided the greatest opportunity to enhance the reliability, predictability, and usability. It goes without saying that such a process far exceeded the capacities of any one individual.

The depth and breadth of emotional intelligence information and application demonstrated by the Research and Development, Psychometrics, Business Development, and Usability teams is evident by the nature of the revisions undertaken. The leadership provided by Chief Scientist, Gill Sitarenios, Ph.D., was integral not only to the modifications made but recognizing when it was necessary to leave well enough alone and when to tirelessly push until we got it right. The extensive efforts and appreciation for the practical application of emotional intelligence was routinely demonstrated by the psychometrics team lead by Sara Rzepa. However, without intimately understanding our customer needs and listening to the wealth of information our customers provide, we would not have been able to realize the product we see today. The collaborative efforts of Thomas Gale (Director of Product Development), James Buchanan (Director, EI Division) and Scott Millar (Manager, User Experience) have been immeasurable.

As the assessment industry continues to evolve, greater emphasis is placed on accessibility, usability, and customizability, all of which happen in a digital space. The contributions of Rick Walrond (Manager, Software & Development) and his team are helping to revolutionize the assessment industry.

The realization of the EQ-i® 2.0 is not unlike a symphony; it required the diligent efforts of a conductor to synchronize the talents of many into one, and it was Charlene Collela (Project Manager) who managed to orchestrate an effective and efficient development process.

The User's Manual and reports have undergone a significant facelift, with the goal of increasing the functional utility of each. Many have contributed to this final product leaving their imprint along the way, perhaps none more than Senior Research Associate, Katie Ziemer and Senior Information Developer, Wendy Gordon. Understanding the need to balance scientific rigor with usability, the reports that accompany the EQ-i 2.0 are a direct result of their scientist-practitioner approach to this revision.

The dedication, passion, and commitment demonstrated by so many along this journey has been nothing short of inspiring, transcending expectations and culminating in a product that we can all be proud of. It is with great thanks that we recognize those who have been instrumental in this revision.

Thomas Gale	Dr. Gill Sitarenios	Scott Millar	Hazel Wheldon	Hile Rutledge
Dr. Derek Mann	Sara Rzepa	Wendy Gordon	James Buchanan	Dr. John Elliot
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May, 2011

I Getting Started with the EQ-i 2.0

In an effort to acquaint the user with the EQ-i 2.0, this section gives some background information regarding the tool.

Chapter 1 offers a description of what the EQ-i 2.0 measures, and potential uses of the instrument in various contexts (e.g., workplace, schools and universities). Exciting new improvements in the set-up, administration, assessment, model, scoring and interpretation are highlighted. The user will soon realize why EQ-i 2.0 is the premier emotional intelligence test in the world, when reading the summary of the instrument's numerous attributes and advantages. Guidelines for effective use of the tool, and a description of participant eligibility (in terms of reading level, age and culture) are presented. An overview and description of exciting new changes in the EQ 360 2.0 assessment, a multi-rater version of the EQ-i 2.0, are also included. The characteristics and responsibilities of a qualified test administrator, and the steps involved and benefits of becoming an administrator are explained. An outline of the information presented in the technical manual is presented.

In Chapter 2, a comprehensive definition and overview of the concept of emotional intelligence are put forth. This chapter also includes a thorough examination of EQ-i 2.0 research applications (e.g., resilience, well-being and brain studies).

Chapter 3 describes seminal changes to the original EQ-i, followed by an analysis of the EQ-i 2.0 structure.

CHAPTER 1

Introduction

For many years, the Emotional Quotient Inventory (EQ-i®) and the EQ 360® have been instrumental in helping individuals and organizations predict and improve human performance. This latest revision, the EQ-i® 2.0 and EQ 360® 2.0, integrates feedback from over 700 consultants, coaches, counselors, participants, and researchers to bring you the most advanced and thoroughly researched measure of emotional intelligence in the assessment industry.

The EQ-i 2.0 and EQ 360 2.0 are easier to use, more culturally applicable, and yield more powerful insights than ever before. Whether you are an executive coach looking to fast-track your client's success, an HR manager aiming to improve your organization's human capital strategy, or a practitioner making decisions about placement or intervention, the EQ-i 2.0 and EQ 360 2.0 give you a rich and compelling view into the emotional and social functioning of individuals and groups.

Recent research and case studies from premier organizations demonstrate that selection and development initiatives based on the EQ-i 2.0 and EQ 360 2.0 can help organizations cut costs and mitigate risks. The results obtained from this inventory can have a huge impact on an organization's bottom-line because they provide valuable insight regarding the respondent's ability to be successful in dealing with environmental demands and pressures. Visit the Resource Center in the EQ-i 2.0 Portal at http://ei.mhs.com to find return-on-investment (ROI) data applicable in your industry.

The EQ-i 2.0 provides a unique feedback experience for the respondent by quantitatively indicating emotional skills that need improvement. Detailed, visually impactful reports help give a balanced view of a person's potential for succeeding in life.

The simple structure of the EQ-i 2.0 and EQ 360 2.0 makes coaching easy because participants can readily see connections between emotional factors, their daily interactions, and their job competencies. This intuitive framework, coupled with the solid science behind the inventory, has made the EQ-i one of the most effective employee recruitment and development tools in the marketplace. Now, the EQ-i 2.0 brings you the same rigorous science in a sophisticated, professional, globally-appropriate, and intuitive user experience.

As listed next, this User's Handbook details what you need to know about using the EQ-i 2.0 and EQ 360 2.0.

- why emotional intelligence has become an established field of interest for both professionals and researchers
- understanding what is different in the 2.0 revision and why
- understanding what the EQ-i 2.0 measures and how these factors are important to job competencies and performance
- planning your EI initiatives and getting organizational buy-in
- the best practices for ensuring your EI initiatives have the greatest impact
- how to make choices in using the EQ-i 2.0 that are right for your organization
- what a respondent's results mean and how to deliver meaningful feedback
- administering the EQ-i 2.0 ethically and appropriately
- how the development and psychometric properties of the EQ-i 2.0 contribute to its ability to predict and improve performance

For complete step-by-step administration instructions, EI tools, and further recommended readings, please log in to your EQ-i 2.0 Portal account at http://ei.mhs.com.

What Does the EQ-i 2.0 Measure?

The EQ-i 2.0 and EQ 360 2.0 measure a set of emotional and social skills that influence the way we:

1. perceive and express ourselves,
2. develop and maintain social relationships,
3. cope with challenges, and
4. use emotional information in an effective and meaningful way.

The EQ-i 2.0 model of emotional intelligence is comprised of fifteen factors across five categories of functioning. These skills, which form the building blocks of abilities such as communication, resilience, and time management, can be mapped theoretically and empirically to job competencies, productivity, academic performance, and other measures of success to help predict and improve functioning.

Figure 1.1. The EQ-i 2.0 Model of Emotional Intelligence

Please see chapter 3 for a detailed description of the EQ-i 2.0 model.

Applications of the EQ-i 2.0

In the Workplace

The EQ-i 2.0 and EQ 360 2.0 are versatile in workplace environments. For instance, because of the brevity and the multifaceted information that it supplies, the EQ-i 2.0 can be used by employers (via HR and OD consultants, psychologists, or EQ-i 2.0 certified users) to provide greater insight when looking for emotionally healthy and high potential personnel. Supplemented by additional sources of information, such as interviews and the results of other assessments, the EQ-i 2.0 can make the recruitment and selection process more reliable and more efficient.

In a career development context, the EQ-i 2.0 and EQ 360 2.0 can be used with current staff to evaluate ongoing functioning and well-being of employees, particularly when this functioning is linked to organizational competency frameworks or other performance metrics that indicate success within a given organization. It may also be a tool for gauging the impact and effectiveness of organizational change and restructuring (i.e., before and after organizational changes). The EQ-i 2.0 also enables qualified professionals to create tailor-made training programs to improve the emotional skills and functioning of employees, teams, and the company as a whole.

The EQ-i 2.0 can also be useful in group or team development. Particularly useful in this regard is the EQ 360 2.0 assessment, a multirater feedback instrument that is invaluable for assessing an individual's strengths/weaknesses from a self/others' perspective (i.e., comparison of ratings from observers together with ratings on the EQ-i 2.0). A large part of effective and smooth teamwork is knowing each member's strengths and weaknesses and leveraging those strengths whenever possible. Pinpointing this kind of information can prove to be a bonding experience that unifies, synchronizes, and/or strengthens the group.

EQ 360$^{2.0}$

The EQ 360 2.0 uses ratings from observers together with the EQ-i 2.0 to confirm or challenge one's self-perceived strengths or weaknesses that impact performance. Leadership development often involves the use of 360-degree assessments. The EQ 360 2.0 excels as a leadership coaching tool because it helps target areas of greatest leverage to optimize leadership potential and performance. Reports help leaders and potential leaders identify "blind spots" in their EI skill sets and provide insights into potential gaps in performance. EQ 360 2.0 feedback can assist HR/OD personnel to create tailor-made training programs geared to strengthen emotional and social functioning.

In Placement (Star Performer Profiles)

The EQ-i 2.0 can be used to predict a candidate's likelihood of success, compared to high performers in a particular role or position. The process involves benchmarking emotional intelligence skills to determine the subscales that are associated with high performance in specific roles, training or academic programs, or other placements. The resulting profiles, sometimes referred to as "star performer profiles," can be used to increase the reliability and efficiency of a selection or approval process by providing a critical perspective about the skills that candidates will need to perform in their roles. Benchmarking also provides a way to evaluate a candidate's fit against organizational/situational culture and results in increased potential for success and retention. Training and coaching become more effective, as they can be targeted at emotional and social skills that are empirically linked with high performance. Additionally, training can give individuals opportunities to learn the specific skills they will need to move along specific career paths.

In Academic Institutions

In the last decade, the topic of emotional intelligence has become integral to many post-secondary school curricula. From first-year Psychology courses to Master's-level HR and MBA programs, the principle of balancing academic with emotional and social strengths has become a cornerstone in the education of many.

The EQ-i 2.0 provides a powerful teaching tool because it:

- employs a teachable, multifactor model of EI that makes it easy to orient students to the concept of EI;
- provides insightful, personalized results to students in a time-efficient manner; and
- is a real-life example of HR tools being used in successful businesses.

The EQ-i 2.0 can be used to help educate students to be more aware of their emotions and those of others, to be successful reality testers and problem solvers, to cope better with stress, to be less impulsive, to be more positive about themselves, to get along better with others, and to enjoy their lives. Such "emotional training" adds an important aspect to education in that it would prepare learners to better cope with environmental demands and increase their ability to function and succeed in life.

The EQ-i 2.0 can also be used in educational settings, such as high schools, technical schools, colleges, and universities, to help school psychologists and counselors identify students who are less likely to adequately cope with scholastic demands that could lead to dropping out of school and/or the possible development of emotional problems. Low scores in general, or as compared to well-performing student profiles (see the previous section), can offer insight into counseling these students.

For guidance and career counselors, EQ-i 2.0 results may also serve as a basis for discussions about vocational and educational options. For instance, if a student is found to have difficulty in handling stress, becoming an air traffic controller may not be the best career choice. Further, if the EI profile indicates that a respondent currently has poor interpersonal skills, counselors could advise the student to take a course or enroll in a training program in this area.

For a review of the literature covering emotional intelligence in academic institutions, please refer to chapter 2.

As Part of Intervention

A growing body of research shows that the EQ-i has been helpful in a variety of clinical, medical, and public safety applications:

- In psychodiagnostics, the EQ-i 2.0 could be used to assess the patient's general degree of emotional intelligence, potential for emotional health, and present psychological well-being (chapter 2). It can be applied to map out areas that need further exploration in the assessment process, as well as to help determine the overall need for therapy, establish clear therapeutic goals, decide on when to terminate therapy, and evaluate the successfulness of the therapy or intervention program.
- The inventory can also be used in assessing the potential for success for those being considered for substance abuse rehabilitation. Research findings presented in chapter 2 provide a good example of how the EQ-i 2.0 can be used to predict an individual's ability to benefit from such programs.
- When examining prisoners under consideration for parole, the EQ-i 2.0 can help predict recidivism (Smith, 2001). Prisoners with higher EQ-i scores (especially on the Empathy, Social Responsibility, Problem Solving, Stress Tolerance, and Impulse Control subscales) have a better chance of not returning to prison.
- Group administration of the EQ-i 2.0 can also help to predict the outcomes of various interventions; it can be used in cost-efficiency evaluations of remedial programs, therapeutic modalities, and treatment-oriented community services (chapter 2).

What's New in EQ-i 2.0

First and foremost, the goal of this revision was to preserve the foundation and integrity of the EQ-i (Bar-On, 1997). The EQ-i has been extensively used in research and practice since being formally published in 1997, resulting in more than 200 published research articles and abstracts impacting millions worldwide. The underlying tenets of the EQ-i are fundamental to its success and warrant retention.

Both existing quantitative research and qualitative information collected from over 700 consultants have yielded significant feedback about the strengths and opportunities for improvement with the EQ-i. Based on this information, some of the strengths of the EQ-i are the:

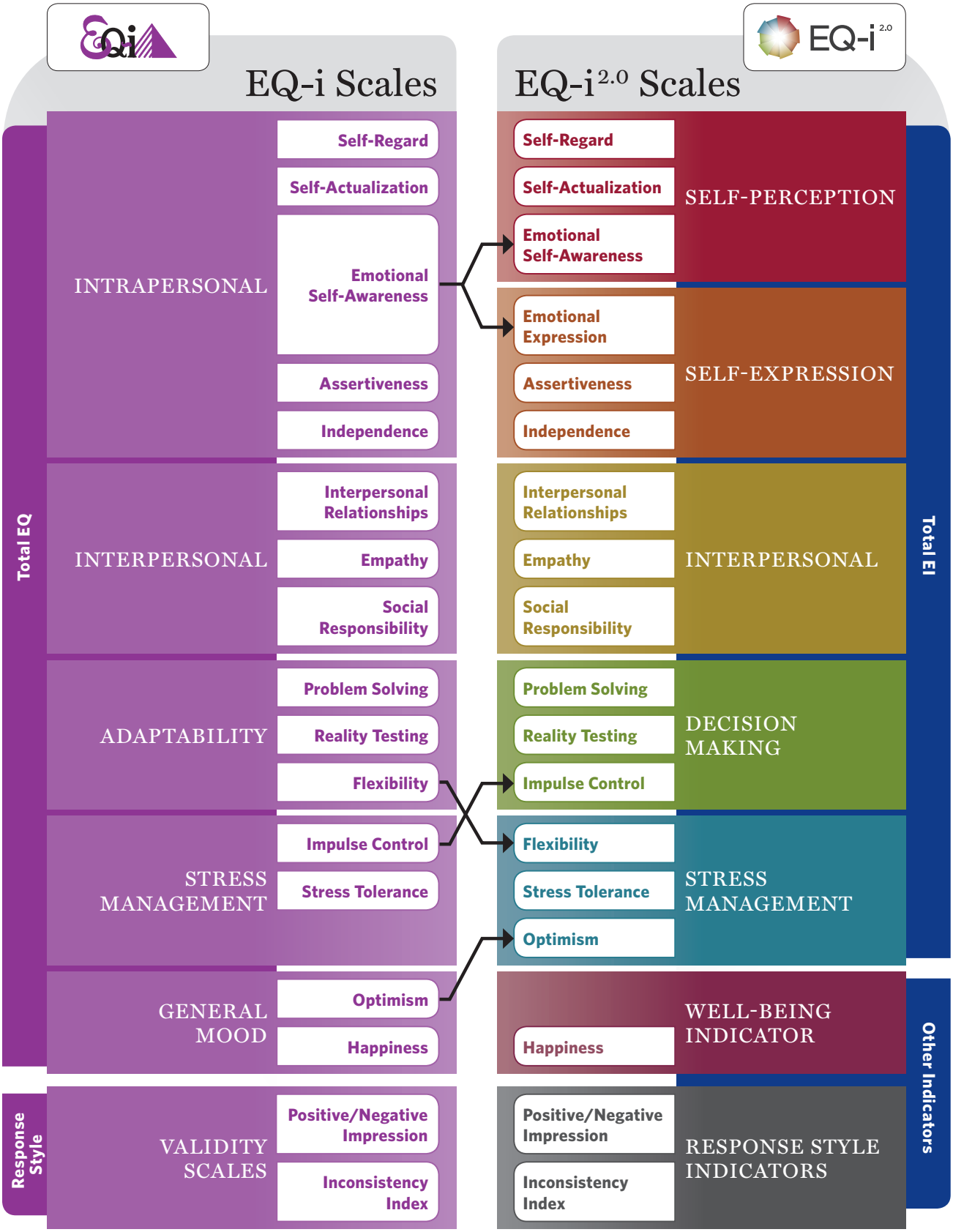
- sound factor structure,
- extensive research base,
- validity and reliability of the tool,
- emphasis placed on well-being and performance, and
- subset of skills and abilities that are amenable to coaching.

At the same time, opportunities were identified to improve and strengthen the EQ-i. As a result, emphasis was placed on the following:

- Improving the alignment between the items and response options
- Enhancing international applicability by eliminating North American idioms
- New and representative normative sample
- Refining the factor structure, including;
  - » Revising the names and makeup of the composite scales to make them more intuitive and more amenable to coaching
  - » Ensuring unidimensional constructs
  - » Ensuring each item appears on only one subscale
  - » Revising scales with interpretation and coaching restrictions
  - » Improving the validity scales and clarifying their utility
- Increasing the symmetry between the EQ-i 2.0 and the EQ 360 2.0
- Improving the reports, including;
  - » Eliminating the use of clinical language and technical jargon
  - » Revising the narrative interpretation of each subscale
  - » Designing a "Balancing Your EI" section
  - » Improving the Coach's version of the report to facilitate better feedback and decision making
- Reducing set-up and scoring time by redesigning the user interface of the web application to make it more intuitive

The revision and development of the EQ-i 2.0 involved many steps. This process is described in detail in chapter 12. For more information about the rationale behind the changes to the EQ-i model of emotional intelligence (Bar-On, 1997), please see chapter 3. The notable enhancements to the EQ-i 2.0 are highlighted on the following three pages, beginning with a side-by-side comparison of the EQ-i and EQ-i 2.0 factor structure (Figure 1.2), set-up and administration, assessment details, scoring, and interpretation.

Figure 1.2. Side-by-side comparison of the EQ-i and EQ-i 2.0



Set-Up and Administration

The EQ-i 2.0 is administered using a different online scoring platform than its predecessor. The following table compares set-up and administration differences between the 2.0 and the original version. Full administration details are provided in chapters 5 and 7 of this guide.

Assessment Details

The EQ-i 2.0 was standardized using new items, resulting in some changes to the assessment and its factor structure (the way the subscales are grouped into composite scales). Table 1.2 shows a summary of the changes to the 2.0 model. Please refer to chapter 3 of this guide for full details.

Table 1.1. What's New in Administering the EQ-i 2.0

	EQ-i (1997)	EQ-i 2.0 (2011)
Administration Options	Online Windows desktop software Paper-and-pencil forms	Online
Online Assessment	*MHS Scoring Organizer* platform, in which you created Groups to organize your participants.	EQ-i 2.0 *Portal* platform, in which you can tag participants using keywords and search without using a hierarchical filing structure.
Inviting EQ-i Participants	The administrator created a unique 10-digit login code and password which gave participants access to the EQ-i. This information was usually copied into the administrator's email program for distribution.	The administrator enters the names and email addresses of participants into the system, either a few at a time or by uploading them as a list. The system then emails participants a unique link to take the EQ-i 2.0. Alternatively, the administrator can create a universal link that is distributed to multiple participants.
Inviting EQ 360 Participants	The administrator created a unique login code and password that gave raters access to the EQ 360. This step was repeated for each EQ-i participant.	EQ-i 2.0 participants nominate their own raters while taking the EQ-i 2.0. Raters are automatically emailed with a unique link to take the EQ 360 2.0.

Table 1.2. What's New in the EQ-i 2.0 Assessment and Model

	EQ-i (1997)	EQ-i 2.0 (2011)
Response Scale	Compound response options. Participants chose from five possible responses ranging from "Very seldom or not true of me" to "Very often true of me or true of me".	Simplified response options. Participants choose from five responses indicating frequency ranging from "Never/Rarely" to "Always/Almost Always".
Reading Comprehension	North American sixth-grade reading level. Test contained double negatives which can lower comprehension.	North American fourth-grade reading level allows for greater reading comprehension for participants whose first language is not English. Eliminates double negatives to ensure reading ease.
Cultural Applicability	At the item level, international populations responded differently to certain statements due to different cultural standards/experiences.	Problematic items and North American idioms were replaced with more universal statements to minimize cultural bias.
Double Content Scales	Some subscales measured two distinct components (e.g., Impulse Control was comprised of Anger Management and Impulsivity items), making interpretation tricky and necessitating analysis of responses at the item level.	Subscales measure only a single construct allowing for easier interpretation and more cohesive constructs.
Double Content Items	Some items belong to two different subscales.	Items belong to only one subscale, allowing for a more intuitive interpretation.
Number of Items	Two versions of the EQ-i were available: a 133-item version, and a 125-item version that omitted the Negative Impression items.	No more clinical-sounding Negative Impression items, therefore only one version of the assessment containing 133 items.
EQ 360 Items	125 or 133 EQ-i items were different from the 88 items of the EQ 360 observer form.	Each of the EQ-i 2.0 items has a corresponding EQ 360 2.0 item. Participants see that raters responded to the same statements, which makes feedback more credible.
Critical Items	Six items to help to identify problem areas such as depressive conditions, psychotic states, and potential for losing control.	Removed all critical items. EQ-i 2.0 items no longer assess potentially psychotic states, nor directly expose times of crises or serious emotional problems.
Adjusted/ Unadjusted Scores	A correction factor designed to adjust for response bias yielded two sets of scores.	No adjusted scores. Interpretation is simpler with one set of scores to examine.

Scoring

Table 1.3 shows a summary of the changes to they way that EQ-i 2.0 results are scored compared to its predecessor.

Interpretation

Results for EQ-i 2.0 assessments are provided in a fully revised set of reports. The original EQ-i reports (e.g., resource and individual summary reports) are not available for 2.0, nor can assessments from the original version be scored using the 2.0. Table 1.4 shows a summary of the changes to the 2.0 results and interpretation resources. Full report details are provided in chapter 3 of this guide.

Table 1.3. What's New in Scoring the EQ-i 2.0

	EQ-i (1997)	EQ-i 2.0 (2011)
Report Transactions	Administrators pre-purchased report "uses". The corresponding use was decremented each time a report was scored/generated.	Administrators can purchase tokens which can be used to generate any EQ-i 2.0 report (i.e., tokens are not report specific).
Comparison Sample (Norm Group)	EQ-i scores are compared to a group of 3,831 respondents based on the 1994 US Census. EQ 360 scores are compared to 1,900 other raters. Samples are representative within 5–13 % of the 1994 U.S. census.	EQ-i 2.0 scores are compared to a group of 4,000 demographically representative respondents based on Canadian and U.S. census figures (i.e., Statistics Canada, 2006; U.S. Bureau of the Census, 2008). EQ 360 2.0 scores are compared to 3,200 other raters. A higher education sample of 1,800 students is stratified by academic program and year of study. Samples are more representative of the population (within 4–5 % of census).
Age Effects	Standardization sample grouped all those aged 50+ in one category, suggesting an apparent drop off in EQ later in life.	Standardization sample includes a representative mix of adults in the 50–64 and 65+ age ranges. Average EI is seen to increase through to retirement.
Scoring Guidelines	Whether a respondent's score placed him/her in the low, average, or high functioning range varied in older reports. Scores were available on only some reports.	Scores and their descriptors can be turned off/on by the administrator and are consistent amongst the reports: < 90 = Low Range 90–110 = Mid-Range > 110 = High Range
Response Style	Results could be labeled "invalid" or "possibly invalid" if responses failed to meet certain parameters.	A newly designed *Response Style Explained* section in the Coach's report flags areas for further investigation, such as short completion time or elevated positive impression. Possible interpretations are suggested so you don't have to refer to your manual. The system does not invalidate results algorithmically.

Table 1.4. What's New in Interpreting the EQ-i 2.0

	EQ-i (1997)	EQ-i 2.0 (2011)
Model (Factor Structure)	Please refer to chapter 3 of this guide.	Please refer to chapter 3 of this guide.
Report Options	Administrators choose from several types of reports depending on what information they wish to provide to the client.	Administrators can turn on or off scores, descriptors, and special pages to tailor the feedback report. You can save your favorite report options as a template for reuse.
Customizing Reports	Reports are available as PDF or RDF files, which can be manually altered on a per-case basis. Custom-built reports available but cumbersome to use.	Flexible, customizable PDF reports allow you to add your own logo, report title, and template. You can apply these customizations to one or many reports at a time.
Workplace Relevancy	Examples of behaviors are general enough to apply to work or home.	Newly crafted *Impact at Work and Strategies for Action* sections give the respondent workplace-specific examples for every subscale.
Coach's Report Item Summary	The number of each item is provided along with the response. Administrators must refer to the manual for the item text.	Participants' responses are provided alongside the item text to facilitate item-level interpretation.
Manual	Administrators choose from several hardcopy manuals that contain different amounts of psychometric data. The EQ 360 2.0 Technical Manual must be purchased separately.	Setup, scoring, and interpretation instructions for EQ-i 2.0 and EQ 360 2.0 are combined in one online User's Handbook, which you can search and print.
Certification	Three-day, in-class certification, with some exceptions. EQ 360 2.0 certifications conducted separately.	Blended learning option (e-learning + in-class) minimizes travel time and expense. Online classroom and exam provide a support network in a sophisticated Learning Management System environment. EQ 360 2.0 certification is included as part of the EQ-i 2.0 workshop.
Support	MHS Client Services available by phone or email; some EQ-i 2.0 resources available upon request only.	Coach and Client Reports offer new interpretive content and additional sections to help coaches with debriefing. Join the MHS Community on the EQ-i 2.0 Portal to access additional best practices, and get answers to your questions from experienced coaches, researchers, and HR professionals.

Overview of the EQ-i 2.0

The EQ-i 2.0 consists of 133 brief items using a five-point response scale. It takes approximately 20 to 30 minutes to complete the EQ-i 2.0, but there are no imposed time limits. The EQ-i 2.0 is suitable for individuals 18 years of age and older. The assessment provides

- a total EI score,
- five composite scale scores, and
- fifteen subscale scores. The 15 subscales of the EQ-i are depicted in Figure 1.1 and are described in more detail in chapter 3.

EQ-i 2.0 raw scores are converted into standard scores based on a mean of 100 and a standard deviation of 15. As with the EQ-i, raw scores are of limited value on their own. Converting raw scores to standard scores facilitates comparison of the respondent's scores to the scores of the normative sample and, theoretically, to the rest of the population. High EQ-i 2.0 scores (above 100), as with the previous version, indicate emotionally intelligent people, while lower scores indicate a need to improve emotional skills in specific areas. This scoring structure is similar to the IQ scoring structure, which is divided into subscale scores that describe the various aspects of cognitive intelligence—hence the term "EQ" (Emotional Quotient), coined by Dr. Reuven Bar-On in 1985 to describe this parallel approach.

EQ 360 2.0

The EQ 360 2.0 assesses emotional intelligence from a multirater, self/others' perspective. Used in conjunction with the EQ-i 2.0 self-report that a client completes, EQ 360 2.0 feedback forms are completed by that client's coworkers, supervisors, direct reports, or significant others. Results from the self-report form and feedback forms are scored together to result in a more complete (or 360-degree) assessment of an individual's EI.

The EQ-i 2.0 has excellent psychometric properties and is scientifically derived like its predecessor. The relationship between the two assessments suggests that they are measuring the same thing. For a detailed look at the psychometric properties of the EQ-i 2.0 and how these new figures compare to the original assessment, please refer to chapter 12.

Features and Benefits

The EQ-i 2.0 was constructed by reviewing and generating items to fit specific operationally defined factors, and the final selection of these items was based on statistical item analysis and the opinions of experienced practitioners and human resources professionals.

The fifteen-factor model of the EQ-i (Bar-On 1997), and the EQ-i 2.0 model is often cited as its most defining feature because each subscale acts as a building block or foundational skill for most job competencies. This approach has proven to be extremely engaging in coaching situations. Imagine an executive whose goal is to improve his resiliency and innovation: these high-level functions can be nebulous and difficult to measure. However, if one looks at ***resiliency*** as a combination of Stress Management, Flexibility, and Optimism, and ***innovation*** as a combination of Problem Solving, Reality Testing, and Independence, one can begin to imagine very actionable steps to improve these executive competencies. The EQ-i 2.0 subscales underpin most so-called "soft skills" and can be theoretically or empirically mapped onto any organization's existing competency framework making it a very versatile and intuitive assessment.

The EQ-i 2.0 is fairly brief in comparison to many other self-report inventories and has a frequency-based response format that tends to elicit better quality information from respondents. The assessment is not too brief that it lacks appropriate coverage of the construct it is trying to measure; it contains enough items to properly measure the construct and provide the client with clear strategies they can use to improve.

For example, if "I am self-aware" was the only item measuring Emotional Self-Awareness, how would a respondent know what to do differently to improve? However, if there are several different items like "I recognize when I am upset" and "I am aware of the impact of my mood on others", it begins to build a picture of the construct and offer precise situations and actions that individuals can work on to improve.

In addition to the general features of the EQ-i 2.0, there are additional advantages of using this inventory:

- A large normative database of thousands of participants provides a representative sample of the population (within 4% of the Canadian and U.S. census figures (Statistics Canada, 2006; U.S. Bureau of the Census, 2008) against which each respondent's results can be scored:
  - » EQ-i 2.0: 4,000 respondents
  - » EQ 360 2.0: 3,200 raters
  - » Higher Education: 1,800 respondents
- Based on the original EQ-i (Bar-On, 1997) and supported by more than 25 years of research
- A multidimensional scope (a total EI scale, 5 EI composite scales, 15 EI subscales)
- Five Response Style Indicators assist with ensuring the accuracy of results
- An international and multicultural focus (EQ-i 2.0 items were created to be as universally applicable as possible)
- Very strong statistical reliability and validity
- Versatile (the EQ-i 2.0 can be used in corporate, educational, clinical, medical, and research settings)
- The premier measure of emotional intelligence
- A concise (approximately a half-hour) and easy-to-use measure

- Appropriate for most individuals aged 18 years and older
- An extensive line of supporting resources

These features are described in more detail throughout this manual.

Principles of Use

It is recommended that the EQ-i 2.0 be used as part of a larger evaluation process, together with other assessment methods and collateral information, such as interviews, other assessment tools, and behavioral observations, when available. Moreover, the results rendered by the use of the EQ-i 2.0 should be viewed as important points to be further examined by additional methods to give a balanced and broader picture of the person being assessed.

Since the EQ-i 2.0 is a self-report measure, it is not recommended for persons who are unwilling or unable to respond honestly to a questionnaire. The EQ-i 2.0 is also not recommended for individuals who are disoriented or severely impaired. EQ-i 2.0 administrators may wish to read the items aloud to respondents with poor reading abilities or whose native language is not English. Translations of the EQ-i 2.0 in various languages are currently in development. Check our website at http://ei.mhs.com or contact MHS for more information.

Because the EQ-i 2.0 is easy to use, administrators require little special training. However, the administrators should be familiar with procedures for obtaining informed consent, avoiding bias, and debriefing respondents and be qualified as per the guidelines in the next section. Informed consent means that the respondent must be told why the EQ-i 2.0 is being used and must agree to provide responses. The EQ-i 2.0 should not be administered in a misleading fashion.

Further, the administrator must try to avoid anything that may bias the responses. Respondents should answer on their own. Questions asked by respondents during administration can be answered in a non-leading manner. However, because it is often difficult to realize when a comment may be leading, it is best to try to defer questions until after all of the items have been answered.

Who Can Participate

The EQ-i 2.0 may be administered in any setting, such as corporate, academic, medical, psychiatric, and research settings or to anyone who is willing to complete the inventory honestly, who meets the following age and reading level criteria, and who is not severely cognitively or emotionally impaired.

Readability

The EQ-i 2.0 was developed with the lowest reading level possible while ensuring that all relevant information was covered. The reading level scores are expressed as a grade score (e.g., a reading level score of 6 indicates that the items can be read by the average sixth-grade student). Reading levels for the EQ-i 2.0 were determined using the Flesch-Kincaid Grade Level Formula (Flesch, 1948; Kincaid, Fishburne, Rogers, & Chissom, 1975):

$$\text{Readability Score} = \left[\frac{\text{total words}}{\text{total sentences}}\right] + \left[\frac{\text{total syllables}}{\text{total words}}\right] - 15.59$$

The resulting reading level of 3.6 suggests that the EQ-i 2.0 requires approximately a third- to fourth-grade reading level for the items. Alternative methods, such as oral administration, may be needed for participants with very low reading skills.

Age Range

The EQ-i 2.0 is appropriate for individuals of both genders who are 18 years of age and older. This age range stems from research on the subject of EI and the composition of the normative sample. There is no upper limit regarding the age range. If the respondents are a few months younger than the recommended age guideline, the results will probably still be reasonably accurate. However, the greater the deviation from the minimum recommended age, the more potential for error.

Even though people with a third to fourth-grade reading level (9–10 years old) can comprehend the EQ-i 2.0, the inventory should not be administered to youths under the age of 18 without thorough consideration of maturity level.

Cultural Applicability

The EQ-i has been used with individuals of varying ethnic backgrounds in North and South America, Europe, Africa, and Australasia. The EQ-i 2.0 normative sample includes various ethnicities in the United States and Canada (within 4% of Canadian and U.S. census figures [i.e., Statistics Canada, 2006; U.S. Bureau of the Census, 2008]). In the norm sample of the EQ-i 2.0, there was no indication of cultural bias or adverse impact contingent on one's race or ethnicity. Based on the success of the EQ-i within multiple cultures and the fact that the EQ-i 2.0 is not biased across racial/ethnic groups, the inference can be made that the EQ-i 2.0 has cross-cultural applicability and utility. Refer to chapter 13 for more information on differences between cultures or visit our Resource Center at http://ei.mhs.com to find ethnographic research studies pertaining to the use of the EQ-i and EQ-i 2.0.

Introducing the EQ 360 2.0

360-degree assessments (also known as multirater feedback or multisource feedback) are a performance evaluation method that provides an individual with the opportunity to receive feedback from his/her co-workers or colleagues (e.g., supervisor, co-workers, peers, direct reports).

The primary goal of a 360-degree assessment is to give an individual a deeper understanding into his/her work functioning from multiple perspectives. 360-degree feedback is usually part of a developmental planning process, with its goal being to create awareness and to establish sustainable, long-term personal growth. The underlying tenet for use of multirater feedback is that data about one's specific workplace functioning, when compared with internal perceptions, are used as a means for enhancing self-awareness and subsequent behavioral change.

Table 1.5. What's New in the EQ 360 2.0

		EQ-360 (2003)	EQ 360 2.0 (2011)
Administration	Inviting EQ 360 Participants	The administrator creates unique login codes and passwords that give raters access to the EQ-360 and ratees access to the EQ-i. This step is repeated for each EQ-i participant being rated.	EQ-i 2.0 participants can nominate their own raters while taking the self-report version of the EQ 360 2.0 online. Raters are automatically emailed with a unique link to take the EQ 360 2.0.
Assessment	Comparison Sample	EQ-360 scores are compared to 1,900 other raters.	EQ 360 2.0 scores are compared to a norm group of 3,200 ratees who are demographically similar to the Canadian and U.S. census figures (i.e., Statistics Canada, 2006; U.S. Bureau of the Census, 2008).
	EQ 360 Items	The 125 or 133 items of the EQ-i were different from the 88 items of the EQ-360.	Self-report items correspond to rater items. Participants see that raters responded to the same statements, which makes feedback more credible, and facilitates comparisons.
Interpretation	Report Output	Administrators select an EQ-i self-report type as part of the EQ-360 bundle. Results yield four reports, an EQ-i and EQ 360 report for client and coach.	EQ-i 2.0 self-report results are included within the EQ 360 2.0 report. You can customize the cover page, and specialty pages as with other 2.0 reports.
	Manual	Hardcopy EQ-360 Technical Manuals and EQ-i Technical Manuals are purchased separately.	Setup, scoring, and interpretation instructions for EQ-i 2.0 and EQ 360 2.0 are combined in one online User's Handbook, which you can search and print.
	Certification	EQ-360 certifications conducted separately.	EQ 360 2.0 certification is included as part of the EQ-i 2.0 accreditation workshop.

What is the EQ 360 2.0?

The EQ 360 2.0 is a multirater version of the EQ-i 2.0 that assesses the same emotional and social skills as the self report but from an observer's perspective. Participants nominate who they would like to get feedback from when they complete their self-report. Raters then complete the EQ 360 2.0 online and results are tabulated simultaneously into one comprehensive report for the participant.

What's New in EQ 360 2.0?

The EQ 360 2.0 incorporates the improvements listed in Table 1.1 that pertain to the set-up, assessment items, scoring, and interpretation of EQ-i 2.0 results. Table 1.5 presents a side-by-side comparison of the version of the EQ-360 published in 2003 and its revision. Please see part III of this handbook for full details.

Qualification and Certification

Administrator Qualifications

The evaluation of the results received from administering the EQ-i 2.0 must be made by a qualified psychologist or other professional familiar with the principles of testing, psychometrics, and normal human behavior.

When the EQ-i 2.0 is being used in clinical, rather than corporate, educational, and research settings, the following guidelines apply:

- Mental health professionals should be familiar with the standards for educational and psychological testing, jointly developed by the American Psychological Association, the American Educational Association, and the National Council on Measurement in Education (APA, 1999).
- Qualified users of this test in clinical settings should also be members of professional associations that endorse a set of standards for the ethical use of psychological or educational tests, or licensed professionals in the areas of psychology, education, medicine, social work, or an allied field.
- Individuals without formal psychological training and professional affiliations should be certified by an MHS-approved EQ-i 2.0 trainer. The certification program, while not mandatory for some users, is nonetheless strongly recommended. Individuals whose only exposure to EQ-i 2.0 assessment is gained from this User's Handbook are not appropriate or qualified users of this instrument.
- All individuals responsible for administering and evaluating EQ-i 2.0 results, regardless of training, should carefully read this User's Handbook and be familiar with it before using the assessment.

Who Requires Certification?

Professionals without graduate-level university credits in tests and measurements are required to become accredited users in order to purchase and interpret EQ-i 2.0 results. Certification provides scientific understanding of the tool's validity and reliability, ethical frameworks for its use, and practical experience in interpretation and feedback.

Professionals who work in the areas of executive coaching, recruitment, organizational development, employee development, management training, leadership and executive development, emotional intelligence research, education, career development, HR management and consulting, and industrial psychology will directly benefit from certification.

Administrative assistants involved in setting up and scoring the EQ-i 2.0 do not require certification provided that they are working under the supervision of a qualified practitioner. Similarly, research students must have a qualified supervisor to ensure that ethical guidelines are followed.

Certification Benefits

Certification helps you use the EQ-i 2.0 effectively and increases your own effectiveness with others. By participating in an EQ-i 2.0 workshop, you will develop a solid foundation of the scientific concepts behind this inventory and you will be trained in the interpretation and feedback of EQ-i 2.0. Certification benefits include:

1. **Customization.** Corporate and personal development programs often fail because they neglect to tailor initiatives to a project's unique realities. Certification teaches you how to tailor EI initiatives to improve employee selection, employee and organizational development, customer and employee retention, and global cooperation by addressing the needs of your organization.
2. **Leadership.** EI self-awareness is essential to sustainable leadership. An individual must understand and manage his or her personal strengths and weaknesses in order to respond to environmental and competitive demands. Only through the understanding of ourselves can we successfully take proactive initiatives to lead others within an organization. Certification provides an opportunity for you to receive your own EQ-i 2.0 feedback and practice coaching others so you can bring out key leadership competencies in your clients.
3. **Teamwork.** The results of the EQ-i 2.0 assessment give a clear picture of a team's strengths and weaknesses by examining the relationships within the team. Just as an individual needs to be self-aware to successfully accomplish goals, so does a team. By addressing its own inter-relationships, a team will develop the commitment to set goals as a group, meet those goals together, and evaluate what has collectively been accomplished.
4. **Organizational Transitions and Changes.** The EQ-i 2.0 measures the ongoing functioning and well-being of workers in an organization, as well as the effectiveness of organizational change and restructuring. Applying information gained from the EQ-i 2.0 to structural decisions can be an invaluable tool in successfully realizing the future vision of your organization.
5. **Employee Selection.** EI can assist in the recruitment process. Research indicates that a strong correlation between emotional intelligence and job performance exists, making the EQ-i 2.0 an ideal part of selecting successful employees. You can create a predictive model of the top performers in your organization to determine what skills are the most valuable to your company in general and/or for a particular function.
6. **Executive Coaching.** The emotional and social skills associated with EI are acquired and can be improved through training. The EQ-i 2.0 identifies the areas requiring growth and gives strategic suggestions for improvement. With the EQ-i 2.0, you gain a fast and insightful way to plan and measure the effectiveness of personal and professional growth.
7. **Networking.** As a certified EI professional, you have access to a private online community of professionals devoted to the use of EI assessments in various settings. Their experiences and contacts will aid you in developing your particular EI program.

An understanding of the research and conceptual framework behind the development of EI assessment tools is essential for their effective use. EI certification workshops give you this knowledge in a stimulating, interactive environment using relevant corporate examples.

As a certified EQ-i 2.0 user, you

- gain an in-depth understanding of EQ-i 2.0,
- become familiar with the ethical and responsible use of EQ-i 2.0,
- gain experience in EQ-i 2.0 interpretation and feedback, and
- learn strategies for coaching others using the EQ-i 2.0 in workplace settings.

Upon successful completion of the EQ-i 2.0 certification workshop, participants become eligible to purchase the EQ-i 2.0.

Certification Agenda

Certification in the EQ-i 2.0 takes a few days and is offered in a blended format consisting of e-learning and in-class or webinar components. Workshops may vary among training partners, but follow the overall structure shown in Table 1.6.

Table 1.6. EQ-i 2.0 and EQ 360 Learning Objectives

Module	Learning Objective	Delivery Method
Overall Certification Learning Objectives	Learners will be able to: • Describe the components of the EQ-i 2.0 including defining composite scales and subscales • Understand the science behind the EQ-i 2.0 • Interpret an EQ-i 2.0 assessment • Administer the EQ-i 2.0 • Follow a structured approach to preparing for a feedback session • Demonstrate the ability to conduct an effective assessment feedback session • Explain the benefits of EI to their client groups • Describe how EI applies to different disciplines • Identify resources available post-certification • Assess which report type is appropriate for their client	Blended solution consisting of e-learning and in-class or webinar components
Module 1: Overview and Framework	Learners will be able to: • Define EI and articulate what EI is not • Explain the evolution and importance of EI • Demonstrate understanding of EQ-i 2.0 Model of Emotional Intelligence • Demonstrate understanding of composite scales and subscales	E-learning
Module 2: The Science Behind the EQ-i 2.0: Psychometrics	Learners will be able to: • Identify response style indicators for the EQ-i 2.0 • Explain validity and reliability as it pertains to the EQ-i 2.0 • Describe the mean and standard deviation • Understand the EQ-i 2.0 norms	E-learning
Module 3: Elements of EQ-i 2.0: Subscales in Action	Learners will be able to: • Apply knowledge of subscale definitions to real examples • Explain how the subscales interact • Demonstrate what high and low scores look like • Develop questions based on relationships between subscales • Demonstrate understanding of relationships between subscales at a high level	In-class
Module 4: Interpretation and Giving Feedback	Learners will be able to: • Interpret an assessment including identifying the response style indicators • Demonstrate the components of a best practice feedback debrief session • Develop questions to lead feedback debrief discussion • Understand the ethics of administering the EQ-i 2.0 and EQ 360 • Practice foundational coaching skills, including effective questioning techniques	In-class
Module 5: Gaining Buy-In	Learners will be able to: • Articulate the different applications of EI among various disciplines • Access information and case studies demonstrating ROI • Work through a process in order to gain buy-in for an EI plan internally and externally to an organization • Highlight the benefits of the EQ-i 2.0 and EQ 360 over other EI assessments • Identify sponsor resistance and ways to overcome it • Determine when it is more appropriate to use the EQ-i 2.0 over the EQ 360 and vice versa	In-class
Module 6: Planning and Administration	Learners will be able to: • Describe the resources available to them post-certification (e.g. handbook, customer service, etc.) • Navigate the Portal • Distinguish between reports, choose the right one for their clients • Determine how to administer the EQ-i 2.0 and EQ 360 with their clients • Determine where to go to get support	E-learning module
Exam	Embedded in e-learning modules • Multiple choice questions embedded in the elearning programs (not scored) Online after completion of program • Online exam to be completed after in-class session, covering all modules	Online
Overview of 360° Assessments and the EQ 360	Learners will be able to: • Describe what a 360° assessment is • Articulate the benefits of a 360° assessment • Describe the components of the EQ 360 • Identify response style indicators for the EQ 360 • Understand the EQ 360 norms	E-learning module

Responsibilities of the Administrator

Consider the following situation: Mary, an outside consultant, is contracted by an organization to coach a group of leaders. The leaders take the EQ-i 2.0 and each attends a feedback session with Mary, who reaffirms that the leaders' results are confidential and for professional development purposes. Midway through the contract, the organization asks Mary to provide the leaders' individual EQ-i 2.0 scores to upper management so they can use the results in their succession planning initiative. They also request the composite results so they can compare the group to a control group of leaders who did not participate in the EQ-i 2.0. When Mary points out that these requests violate the leaders' consent to take the EQ-i 2.0 confidentially, the organization reminds Mary that they are the stakeholders and the paying client.

Identifying Your Client

Who is the real client in Mary's situation? The organization's upper-management team? The leadership group? Or the individuals Mary individually assessed?

When embarking on any assessment initiative, consider how the results will be used, who will have access to the scores, and discuss any potential future uses with the participants and any party engaging your services. As part of getting the informed consent of the participants, you must disclose the planned uses and ensure that participants will not be penalized for withholding their participation.

In Mary's case, her ethical dilemma could be prevented by having a discussion upfront with the organization that identified the EQ-i 2.0 participants as her clients, and clarifying that should the scope of the initiative change, they would not be able to make use of the initial results.

Who Owns the Data?

The EQ-i 2.0 respondent owns their results in most development situations. When the EQ-i 2.0 is used in selection, the organization is also an owner. Should the organization request it in this case, you are obligated to provide the EQ-i 2.0 results. Additionally, should the job applicant request to see results, these should be made available to the requesting party in a timely fashion.

In Mary's case, the organization could have been established as co-owners of the EQ-i 2.0 data prior to administration, and Mary would have included succession planning as one of the potential purposes of the EQ-i 2.0 when gaining the informed consent of the leaders.

For a complete discussion of identifying your client and sharing EQ-i 2.0 data, please see chapter 4, *Planning the EQ-i 2.0 Assessment Process*.

Confidentiality

EQ-i 2.0 results (including scores, reports, and composite results) should be viewed only by those responsible for their preparation and for delivery of feedback to the respondent and those responsible for candidate selection. All information is regarded as confidential.

All information shared between the administrator and respondent is confidential and subject to rules regarding privileged communication between qualified professional and client. If any aspect of one's results is discussed with others who are not directly involved in the provision of feedback, such as for consultation or teaching purposes, no identifying information should be disclosed.

There are some situations in which reporting is compulsory by law. Please contact MHS for more information on our policy for test disclosure.

Most administrators list the exceptions to confidentiality in their jurisdiction on an informed consent form that must be signed by the respondent before the EQ-i 2.0 is administered. See the *Preparing Participants* section in chapter 5, *Setup and Scoring*, for further details.

You may wish to communicate a policy to respondents that following your feedback session, all copies of the reports are destroyed. Your clients should have a general understanding of your expectations of test disclosure, discussed in the next section.

Test Disclosure

The EQ-i 2.0 is a copyrighted tool. Therefore, it cannot be reproduced without the explicit written permission of the publisher. The EQ-i 2.0 is also a regulated test; in accordance with the ethical and professional standards of the American Psychological Association and the Standards for Educational and Psychological Testing, the use and interpretation of results is restricted to qualified professionals (see *Qualification and Certification* earlier in this chapter for more information).

Any printed EQ-i 2.0 reports should be retained in a confidential and secure location as long as required by any applicable laws or regulations. Recent laws (e.g., the United States' Health Insurance Probability and Accountability Act [HIPAA] and the Canadian Personal Information Protection and Electronic Documents Act [PIPEDA]) require that individuals have access to the personal information contained in their files. Additionally, a file may be subpoenaed for a legal proceeding. It can be difficult to know how to provide the legally required information while maintaining copyright protection and

security of test materials. It is recommended that local laws and regulations be followed for the appropriate storage and release of personal information, test materials, and results.

Rights of the Respondent

Respondents of the EQ-i 2.0 have the right to

- participate voluntarily,
- complete the inventory in a private setting,
- know how the results will be used and who will have access to the results (informed consent), and
- withdraw at any time.

The basic rationale for administering the test should be explained to the respondent(s) before beginning the EQ-i 2.0 assessment and explained in more detail after completing it. The respondent(s) should not merely be e-mailed a link and told to complete it. In either a group or individual meeting, the administrator must put the inventory into proper context, ensure confidentiality, explain that the results will not be the only factor in decision making, and assuage any anxiety the respondent(s) may feel about completing the inventory.

Informed consent must be obtained before administration, and the EQ-i 2.0 must not be used to trick or dupe respondents into giving information they do not want to share. Informed consent refers to providing the respondent with as much relevant information as necessary to allow him or her to consciously decide whether to participate in the assessment process. At the very least, the respondent must be told the reasons for issuing the inventory and how the results are going to be used. Participation must be voluntary, and verbal or written permission must be acquired. Written permission is recommended over verbal consent whenever possible. Informed consent is required in clinical, medical, educational, corporate, and even research settings.

Informed consent refers to providing the respondent with as much relevant information as necessary to allow him or her to consciously decide whether to participate in the assessment process.

Obtaining consent does not imply that once permission is granted the respondent cannot change his or her mind. Respondents should be free to withdraw consent and discontinue participation at any time.

Data Security

Access to MHS online scoring services located at http://ei.mhs.com is restricted to qualified users and requires an ID and password. Registration of MHS customers or their designated administrators ("Administrators") is rigorous with defined qualification user levels. Identity is confirmed by a *Qualification Form* which is a binding test user agreement coupled with a review of qualifications and certification.

All MHS data (including Administrators and test user information, test data, including responses to test items, and report text) are stored in an industry-standard secure database. Access to these data is strictly controlled. A temporary password initially provided by MHS must be changed upon initial log-in. MHS is able to reset a password at the request of the customer, if necessary.

The EQ-i 2.0 is scored by a separate secure scoring server controlled by MHS with an advanced level of security protection. Once administered, test reports are returned to the Administrator by using an encryption technology described below.

MHS protects the personal data of MHS customers, the data of their clients, and the data collected via electronic commerce transactions with the highest levels of security. Through the e-commerce purchase process, we ask for the purchaser's name, address, license number, credit card information ("Financial Data"), and other personal data required to process requests to purchase and maintain customer accounts. MHS servers use 128/256-bit industry-standard Secure Sockets Layer (SSL) encryption which is encryption technology that works with the most current web browsers. SSL encrypts the purchaser's personal information (including Financial Data and other personal data) as well as test user information (including test data, responses, and reports returned to the Administrator), protecting against disclosure to third parties.

Contents of this Handbook

This handbook is divided into five parts to help you move through the EQ-i 2.0 and EQ 360 2.0 planning, assessment, and follow-through processes. A summary of each chapter is provided in Table 1.7.

Table 1.7. Using this Handbook

Part I: Getting Started with the EQ-i 2.0	**Chapter 1:** Introduction	Answers who, what, when, where, and why to administer the EQ-i 2.0 and EQ 360 2.0, and how they're different from previous editions.
	Chapter 2: The Building Blocks of Emotional Intelligence	A brief history of emotional intelligence and why it's useful in organizations.
	Chapter 3: The EQ-i 2.0 Framework	Describes what the versions of the EQ-i 2.0 and EQ 360 2.0 measure, and the rationale for changes.
Part II: Administering a Self-Report EQ-i 2.0	**Chapter 4:** Planning the EQ-i 2.0 Assessment Process	How to get the most out of the EQ-i 2.0 in your setting, including getting buy-in from key stakeholders and considering ethical cases.
	Chapter 5: EQ-i 2.0 Setup and Scoring	How to prepare participants, invite them to take the EQ-i 2.0, and customize feedback reports.
Part III: Administering a Multirater EQ 360 2.0	**Chapter 6:** Planning the EQ 360 2.0 Assessment Process	How to get the most out of the EQ 360 2.0 in your setting, including selecting and preparing raters, and encouraging participation.
	Chapter 7: EQ 360 2.0 Setup and Scoring	How to invite participants and raters to take the EQ 360 2.0, and generate multirater reports.
Part IV: Using the Results	**Chapter 8:** Understanding the Results	How the scores are determined and what they mean.
	Chapter 9: Giving Feedback	Planning and conducting a productive debrief session with the respondent.
	Chapter 10: Coaching Fundamentals	How to choose between group and individual development, and making the most out of development resources.
	Chapter 11: EQ-i 2.0 Case Studies	EQ-i 2.0 application with real-world clients.
Part V: Creating the EQ-i 2.0 and EQ 360 2.0	**Chapter 12:** Stages of Development	Describes the conceptualization, pilot studies, data collection process, and why these stages result in a more predictive assessment.
	Chapter 13: Standardization, Reliability, and Validity	Describes the standardization, reliability, and validity of the tools as well age, gender, and multicultural effects of the EQ-i 2.0 and EQ 360 2.0.

CHAPTER 2

The Building Blocks of Emotional Intelligence

Emotional intelligence as a practical concept revolutionized the way people view intelligence. This chapter looks at a brief history of the theories and research that informed the creation and use of the EQ-i® 2.0.

What is Emotional Intelligence?

Intelligence has traditionally been defined as the capacity to understand, learn, recall, think rationally, solve problems, and apply what one has learned (Kaplan & Sadock, 1991). This capacity has conventionally been measured by cognitive intelligence or "IQ" (Intelligence Quotient).

Two of the most popular intelligence tests are the Stanford-Binet Intelligence Scale and the Wechsler Adult Intelligence Scale. The former instrument was the first, developed in 1905 and published in 1916 (Terman, 1916). The Wechsler scale was developed in 1939 (Wechsler, 1939) and has evolved over the years, with the fourth edition released in 2008.

David Wechsler's definition of "general intelligence" is perhaps the most useful, because it lends itself to the consideration of other forms of intelligence in addition to cognitive intelligence. He viewed this concept as the "aggregate or global capacity of the individual to act purposefully, to think rationally, and to deal effectively with his (her) environment" (Wechsler, 1958, p.7). In essence, this includes the ability to adapt to new situations and to cope with life circumstances successfully. Within this broad definition and wide conceptual framework, it is possible to consider the notion of emotional intelligence. In fact, Wechsler discussed these "non-intellective" factors in general intelligence as early as 1940 (Wechsler, 1940). Although he concentrated his own work more on the "intellective" (or cognitive) aspects of intelligence, he was always clear about the existence and the importance of the non-cognitive component of general intelligence. Wechsler's foresight and recognition of the importance of emotional intelligence is evident in his writings:

> The main question is whether non-intellective, that is, affective and cognitive abilities are admissible as factors of general intelligence. The contention of this paper has been that such factors are not only admissible, but necessary. I have tried to show that in addition to intellective there are also definite non-intellective factors that determine intelligent behavior. If the foregoing observations are correct, it follows that we cannot expect to measure total intelligence until our tests also include some measures of the non-intellective factors (Wechsler, 1943, p. 103).

In 1948, Leeper proposed that "emotional thought" is part of and contributes to "logical thought" and intelligence in general. These early proposals were succeeded nearly half a century later by the ideas of Harvard University's Howard Gardner, who broadened the way people have traditionally considered cognitive intelligence since the early twentieth century (Gardner, 1983). Gardner believes intelligence encompasses multiple dimensions, combining a variety of cognitive aspects with elements of emotional intelligence (or "personal intelligence," as he called it). The emotional (or personal) dimension of his concept of "multiple intelligence" includes two general components that he referred to as "intrapsychic capacities" and "interpersonal skills."

The concept of emotional intelligence has brought new depth to the understanding of human intelligence; it enhanced the ability to evaluate one's general or overall intelligence. Not unlike cognitive intelligence, however, emotional intelligence has been difficult to define. Broadly speaking, emotional intelligence addresses the emotional, personal, social, and survival dimensions of intelligence, which are often more important for daily functioning than the more traditional cognitive aspects of intelligence. Emotional intelligence is concerned with understanding oneself and others, relating to people, and adapting to and coping with the immediate surroundings in order to be more successful in dealing with environmental demands. Emotional intelligence is tactical (immediate functioning), while cognitive intelligence is strategic (long-term capacity). Emotional intelligence helps to predict success, because it reflects how a person applies knowledge to the immediate situation. In a way, to measure emotional intelligence is to measure one's "common sense" and ability to get along in the world.

The evolution of the EQ-i as an assessment of emotional intelligence began in 1980, with the independent development of a theoretically eclectic and multifactorial approach to operationally defining and measuring emotional intelligence. The seminal work of Bar-On (1980) was inspired by his work

as a clinical psychologist, with the goal of answering the question, "Why do some people have better psychological well-being than others?" This question ultimately expanded into, "Why are some individuals better able to succeed in life than others?" These questions commanded a thorough review of the factors (emotional skills) thought to determine general success, in addition to maintaining positive emotional health. It soon became clear that the key to determining and predicting success is not cognitive intelligence alone, as many cognitively intelligent people flounder in life, while many less cognitively intelligent individuals succeed and prosper. During the 3-year period between 1983 and 1986 while he completed his doctoral studies in South Africa, Bar-On had directed his efforts at identifying the most important factors involved in coping with environmental demands, at which point his research revealed a non-significant relationship between cognitive intelligence and emotional intelligence.

The second phase of Bar-On's research was conducted in Israel during the latter part of 1986 through late 1993. The third and final stage of Bar-On's research, that led to the first commercial version of the EQ-i, began in 1994. This stage involved the continued examination of the EQ-i components to describe and measure the various subsets of emotional intelligence on a more diverse population. Collaborative research projects were conducted throughout Argentina, Canada, Germany, Great Britain, India, Israel, Nigeria, the Philippines, South Africa, Sweden, and the United States. These early development stages of the EQ-i included over 10,000 people from around the world.

Psychologists continued to challenge the conventional view of intelligence. John Mayer at the University of New Hampshire and Peter Salovey at Yale University concentrated their research efforts on the "emotional" aspect of intelligence (Mayer, 1986; Mayer, DiPalo & Salovey, 1990; Mayer, Mamberg & Volanth, 1988; Mayer & Salovey, 1988, 1993, 1995; Mayer, Salovey, Gomberg-Kauffman & Blainey, 1991; Mayer & Volanth, 1985; Salovey & Birnbaum, 1989; Salovey, Hsee & Mayer, 1993; Salovey & Mayer, 1990; Salovey, Mayer & Rosenhan, 1991; Salovey & Rodin, 1985). They expanded upon Gardner's approach and looked primarily at six components of "emotional intelligence" that are very similar to what Bar-On (1997) refers to as Emotional Self-Awareness, Assertiveness, Empathy, Interpersonal Relationship, Stress Tolerance, and Impulse Control. Of the 15 factors underlying the EQ-i, 11 factors had been at the forefront of Bar-On's research for nearly two decades. The 15 factors of the original EQ-i (Bar-On, 1997) and their abbreviations are in Table 2.1.

Table 2.1. 15 Factors of the Original EQ-i

Intrapersonal Components	Interpersonal Components
• Self-Regard (SR) • Emotional Self-Awareness (ES) • Assertiveness (AS) • Independence (IN) • Self-Actualization (SA)	• Empathy (EM) • Social Responsibility (RE) • Interpersonal Relationship (IR)
Adaptability Components	**Stress Management Components**
• Reality Testing (RT) • Flexibility (FL) • Problem Solving (PS)	• Stress Tolerance (ST) • Impulse Control (IC)
General Mood Components	
• Optimism (OP) • Happiness (HA)	

The release of Daniel Goleman's (1995) *Emotional Intelligence: Why It Can Matter More than IQ* served to popularize the construct of emotional intelligence, rendering it a hot topic among academics, coaches, consultants, psychologists, and the layperson alike, thereby paving the way for—and in some cases creating a demand for—a valid and reliable measure of EI. The extensive work of Reuven Bar-On culminated in 1997 with the release of the first psychometrically valid and reliable measure of emotional intelligence, the EQ-i (Bar-On, 1997).

The term emotional intelligence (EI) has significantly evolved since the first release of the EQ-i, enduring rigorous debate over how to define it, how to measure it, whether it can be developed, and whether or not it adds incremental value over and above personality and IQ. This intense scrutiny of EI helped to refine the construct; not only has EI endured, its utility is more deeply understood, and its use more widespread. As a result, the operational definition of emotional intelligence as it relates to the EQ-i 2.0 is:

> ...a set of emotional and social skills that influence the way we perceive and express ourselves, develop and maintain social relationships, cope with challenges, and use emotional information in an effective and meaningful way.

The next section of this chapter will take a detailed look at the rich empirical support for the EQ-i that provided the foundation for developing the EQ-i 2.0.

The EQ-i: A Detailed Look

Well-Being

The EQ-i evolved from a research question Dr. Reuven Bar-On proposed 25 years ago: "Why do some people have better psychological well-being than others?" Since then an entire body of research has developed, investigating the links between EI and well-being, generally concluding that EI is a beneficial predictor of emotional and psychological health and well-being (e.g., Martins et al., 2010; Yalcin et al., 2008).

Psychological well-being is defined as one's overall psychological condition, which has widespread cognitive, emotional and behavioral implications (Bar-On, 1992). In the development and establishment of the EQ-i's construct validity, relationships between psychological well-being and the various EQ-i subscales were examined. At the time, self-regard, interpersonal relationship, independence, assertiveness, self-actualization, happiness, problem-solving, stress tolerance, impulse control and reality testing were the most valid and reliable elements of psychological well-being (Bar-On, 1992). Additional facets of emotional intelligence (e.g., emotional self-awareness, empathy, optimism) were later included in Bar-On's research and added to the conceptual model of the EQ-i, which further helped support the link between emotional intelligence and well-being (Goleman, 1995).

Overall EI has been shown to be correlated with some of the best measures of emotional functioning, such as emotional stability (positive relationship), apprehension (inverse relationship), and tension (inverse relationship) as measured by the 16PF (Bar-On, 2002). Moreover, high negative correlations were discovered between total EI and strong indicators of pathology such as anxiety, depression, and schizophrenia, and borderline features as measured with the PAI (Bar-On, 2002). Along a similar investigative vein, mean scores on the current EQ-i 2.0 were higher for the general population group than depressed/dysthymic and other clinical groups (e.g., schizophrenia) and each difference approached or exceeded a medium effect size (see chapter 13).

Particularly in the case of the EQ-i, a meta-analysis conducted by Schutte et al. (2007) showed that the EQ-i, with an average effect size of .49, had a stronger association with measures of mental health than did other measures of EI (i.e., Trait Meta Mood Scale, Salovey et al., 1995; Assessing Emotions Scale, Schutte et al., 1998). More recently, another meta-analysis examining different measures of EI on a more globally diverse sample, concluded that the EQ-i had a similar association of .44 with measures of health (Martins et al., 2010). These two larger meta-analyses summarize years of research showing that the EQ-i can be beneficial in predicting psychological health outcomes in various settings. For instance, the EQ-i has proven to be valuable when examining the psychological adjustment of children with cancer. Regardless of the stage of illness or gender, children suffering from cancer who have higher emotional intelligence scores demonstrate better psychological adjustment and have stronger functioning of internalizing and externalizing behaviors (Haffey, 2007). Similar findings were observed in a control group study of adults with Type 2 diabetes who reported increased well-being, quality of life, and emotional intelligence after participating in a targeted EI development program (Yalcin, 2008).

Resilience

Emotional intelligence has at its core the ability to use emotions to effectively cope with challenges. This includes the capacity to choose among a repertoire of coping strategies (flexibility and stress tolerance), display a positive disposition towards your situation and change in general (optimism), and feel that you can calmly influence a stressful situation without being derailed by your emotions (problem solving).

As alluded to in the history of the EQ-i, coping with and remaining resilient in the face of demands and pressures have always been integral components of this assessment and, as such, much research has been conducted into whether EI supports resilience and coping in the face of stress in various situations and environments (e.g., workplace stress, physiological illness).

If emotional intelligence is central to how we cope, we would expect individuals with high EI to be more likely to use adaptive coping styles than maladaptive styles. Research has shown that the EQ-i is a positive predictor in using adaptive coping styles ("rational" and "detached") and a negative predictor in using maladaptive coping styles ("emotional" and "avoidance") (Petrides et al., 2007). Furthermore, this research suggests that EI is a predictor of coping style selection above any effects contributed by personality (e.g., the Big Five). This incremental finding supports the notion that since EI is amenable to coaching and development, by focusing training efforts here (rather than at personality characteristics), individuals become better equipped to identify emotions and choose effective coping strategies to remain resilient in the face of stress. In a study of school principals, significant positive relationships were found between EQ-i scores and principals' resilience, with General Mood being a significant predictor of resilience (Bumphus, 2009). This type of research, linking the EQ-i to resilience, helps to shed light on the far-reaching effects emotional intelligence can have, not only on retaining top employees, but also on ensuring they are equipped to weather the inherent stressors that come with their roles. The EQ-i has also been shown to measure one's ability to cope with the stressful environmental demands of adjusting to a new country (Bar-On, 1997), where Total EQ was shown to be positively related to acculturation (i.e., adjustment to a new environment) and emotional health.

Seligman's term "learned optimism" may help explain why emotional intelligence is related to resilience in the face of stress. Learned optimists, when confronted with pressure or challenges, tend to make specific, temporary, and external attributions about their situation; pessimists make more enduring, global internal attributions about a stressor (Seligman, 2006). Various studies have shown the impact of optimism (one of the subscales of the EQ-i) and the ability to handle stress on performance in education settings (Schulman, 1995) and on job performance, as indicated by variables such as net sales (Lusch & Serpkenci, 1990; Schulman, 1995).

Overall, recognizing and identifying emotions and the way they manifest themselves in physiological symptoms, as well as managing these emotions, can help individuals recognize when they are stressed and, thus, reduce the chance of burnout. In a study examining coping with occupational stress, low to moderate positive correlations were found between EQ-i subscales and purposeful task-orientated efforts aimed at solving problems (as measured by the CISS; Endler & Parker, 1990, 1994); whereas low to moderate negative correlations were found between the subscales and emotional reactions to stressful situations (e.g., becoming angry or preoccupied) (Bar-On, 1997). Task-orientated coping tends to be related to adaptive outcomes in contrast to the nonadaptive outcomes of depression and anxiety associated with emotion coping processes.

Leadership

Leadership is one of the most intensely studied topics in the behavioral/organizational sciences. While research has increased our understanding of effective leadership in terms of personal characteristics and behavior, Barrow (1977) asserted that it is difficult to demonstrate whether leaders' behavior has an impact on the performance of others or whether group productivity is the result of a multitude of other interactive forces. In this section, behaviors that have been associated with leadership effectiveness are identified, and research findings are presented that demonstrate how emotional intelligence both influences leadership and predicts leadership success or derailment.

The literature that examines the interrelationships between the variables involved in effective leadership supports a multidimensional approach to describing leadership behavior (Barrow, 1977). Early research in this area conducted at Ohio State University (Fleishman, 1953; Halpin, 1954; Stogdill & Coons, 1957) extracted, through factor analysis, nine dimensions of leadership behavior: initiation, membership, representation, integration, organization, domination, communication, recognition, and production. Two factors emerged that accounted for most of the variance: (1) initiating structure (the degree to which the leader focuses on activities such as assigning tasks and specifying procedures for group members), and (2) consideration (the degree to which the leader helps create an atmosphere that is warm, trusting, and supportive).

Researchers at the University of Michigan (Likert, 1961; Tannenbaum, 1966) classified leadership behavior in terms of two basic dimensions: (1) employee orientation, and (2) production orientation. According to this approach, the employee-oriented leader involves subordinates in decision making and includes them in goal setting. On the other hand, the production-oriented leader focuses on task organization, specification of procedures in order to complete the task, and setting precise work standards. These two studies represented major breakthroughs in the study of leadership.

Research in the area of leadership eventually changed its focus from examining behavioral dimensions to distinguishing between effective and ineffective leadership. Fiedler (1967) was one of the first researchers to study whether personal or situational characteristics are more important determinants of effective leadership than other characteristics. In his contingency model, there are two basic aspects of leadership effectiveness: (a) relationship-motivated, and (b) task-motivated. While relationship-motivated leaders are primarily concerned with developing supportive group relationships, task-motivated leaders focus on task accomplishment. Leadership situations are defined on a continuum of favorability, with task-motivated leaders being more effective in highly favorable or unfavorable situations, and relationship-motivated leaders more effective in the mid-range of situation favorability. According to the contingency theory, individuals should be placed in situations that are best suited for their leadership characteristics.

One of the more current approaches to leadership focuses on transformational leadership. As its name implies, transformational leadership looks at the process of changing and transforming individuals. Burns (1978) described transformational leadership as a process in which leaders and subordinates raise one another to higher levels of morality and motivation. Transformational leaders motivate individuals to perform beyond baseline expectations, arouse dormant needs in their subordinates, and regulate emotions. Emotional intelligence is thought to play a particularly important role in transforming others. Transformational leaders often seek to empower subordinates, which increases subordinate commitment. An effective transformational leader knows how emotions affect others' interactions, whom others will follow, and how to make decisions. Transformational leaders are also able to understand and manage their own emotions, making it possible for them to be flexible and creative in their decision making, consider alternative approaches, and have the self-confidence needed to take action (Bass & Avolio, 1997).

Emotional intelligence as measured by the EQ-i contains a number of factors that have been identified as integral to effective leadership (Hansen, 2010; Jasvinder, 2010; Jerome, 2010), including the Interpersonal aspects of the EQ-i (Bumphus, 2009; Cavins, 2006; Hayashi, 2006), Stress Management (Cavins, 2006; Morehouse, 2007), Adaptability (Cavins, 2006; Morehouse, 2007), Empathy (Cavins, 2006), Optimism (Dries & Pepermans, 2007; Hayashi, 2006), Assertiveness (Dries & Pepermans, 2007; Gasiorowska, 2007), Independence (Dries & Pepermans, 2007), Flexibility (Dries & Pepermans, 2007), Self-Actualization (Gasiorowka, 2007), Problem Solving (Cavins, 2006; Gasiorowka, 2007), and Social Responsibility (Cavins, 2006; Dries & Pepermans, 2007). Despite the positive relationship between EI and leadership, the debate continues as to the depth and breadth of that relationship. Although ample empirical support is readily available in support of this EI-leadership connection, a number of independent studies have suggested a weak relationship between the two (Brown, Bryant, & Reilly, 2006; Milhoan, 2008; Noland, 2009; Oney, 2010; Snuggs, 2007).

The application of meta-analytic techniques is an effective method for empirically evaluating the breadth of research addressing the relationship between EI and leadership. Rosenthal (1995) nicely describes the importance and utility of meta-analytic reviews as:

> ...quantitative summaries of research domains that describe the strength of the effect or phenomenon, its variability, its statistical significance, & the nature of the moderator variables from which one can predict the relative strength of the effect or phenomenon (Rosenthal, 1995).

In other words, a meta-analysis is the 'study of studies' that helps to remove the subjective interpretation around inconsistent research findings. Two independent meta-analyses have been conducted addressing the link between emotional intelligence as measured by the EQ-i and leadership. In a study conducted by Martin (2008), a strong positive relationship was found linking emotional intelligence to leadership. A second meta-analysis conducted by Harms and Crede (2010), further supports the link between emotional intelligence and leadership, specifically transformational leadership, when taking into account same-source raters (consistent raters of emotional intelligence and leadership).

Overall, the link between emotional intelligence and leadership is meaningful. Many variables such as empathy, self-awareness, and self-regard share a strong connection with transformational leadership. The EQ-i offers an assessment of the factors of emotional intelligence that are empirically linked to specific behaviors of successful leaders. As such, the EQ-i shows promise as a useful tool for coaching and developing effective leaders.

Personality

There has been some debate over whether the characteristics of emotional intelligence differ from traditional models of personality, and if such a difference should exist, does EI add practical and incremental value over such personality measures?

The EQ-i was originally developed to measure a number of key "factors" that were related to psychological well-being, so there is little doubt that there will be some associations between emotional intelligence and personality. The caution here is that while EI can be related to various personality traits or types, it should be a distinct construct in and of itself, adding to our understanding of performance above and beyond that which is contributed by personality. Independent studies have shown mixed results on the distinctness of EI from personality. Ciarrochi et al. (2001), Davies et al. (1998) and Livingstone and Day (2005) showed strong overlap between EI and personality. Davies noted, for instance, that only a small amount of uniqueness remains in EI after removing the overlap contributed by personality.

Conversely, other independent researchers have concluded that EI can be separated and viewed as a distinct construct from personality (Petrides & Furnham, 2001) and that although relationships exist, EI can predict performance above and beyond measures of personality (Van Rooy & Viswesvaran, 2004; van der Zee & Wabeke, 2004). In the case of the Big Five, the EQ-i significantly explained variance in job competency performance after controlling for the Big Five (van der Zee & Wabeke, 2004). Researchers have also found relationships, but not complete overlap, between MBTI personality preferences and elements of the EQ-i. For example, people with a preference for extraversion tend to have higher results in Intrapersonal, Interpersonal, Adaptability and General Mood Composite scales as well as higher Total EI results (Leary et al., 2009; Torrington, 2001; Farnsworth et al., 2002). There also emerges a positive correlation between a preference for feeling and the Interpersonal Composite which contains the elements of Empathy, Interpersonal Relationship, and Social Responsibility (Leary et al., 2009).

An independent meta-analysis helps to bring clarity to the debate (Rosenthal, 1991), concluding that there is likely more overlap between EI and personality than both researchers and EI practitioners would like; however, EI does add incremental validity over personality, yet personality failed to add incremental validity over emotional intelligence (Van Rooy & Viswesvaran, 2004). In this meta-analysis, Van Rooy & Viswesvaran found significant positive correlations between EI and each of the Big Five factors, ranging from .23 (Agreeableness, Openness to Experience) to .34 (Extraversion). Similar (albeit a bit stronger) correlations were found when examining the relationship between the EQ-i 2.0 and the Big Five personality traits, ranging from .10 (Openness

to Experience) to .61 (Conscientiousness), and a negative relationship was found between Neuroticism and Total EI (-.71). However, as will be discussed in the next section, EI's advantage over personality measures is that it is dynamic and can be improved through coaching, training, and development, whereas people tend to feel "stuck" with the personality type or trait they are dealt (Stein & Book, 2006).

Training and Development

One advantage that the EQ-i has over any measure of personality is that the skills and behaviors measured by the EQ-i can be enhanced, whereas personality is largely viewed as a stable and relatively fixed characteristic of the way one functions in most situations, most of the time. For this reason, EI can be used to "translate" desired personality characteristics into skills and behaviors that are more amenable to coaching and training. There is a rabid market for training emotional intelligence; EI consulting and training thrives on the very notion that an individual's EI can be enhanced through personal development. Goleman (1998) suggested that as many as four out of every five companies have efforts directed at improving the EI of their employees, with such end goals as increased customer service (Cavelzani et al., 2003) and performance on cross-cultural projects (Gabel et al., 2005). Coaches, consultants, and HR professionals have a responsibility to become educated consumers and purveyors of responsible practice. Understanding the mechanisms involved in developing emotional intelligence is the first step to a successful training program. Independent research on the EQ-i generally supports the notion that EI is amenable to change (Dulewicz & Higgs, 2004; Fletcher et al., 2009), and that training programs do not simply result in higher EI scores, but rather practical behavioral change with implications for enhanced well-being, performance, and satisfaction.

Dulewicz and Higgs (2004) reported a number of significant changes in EQ-i scores from pre-test to post-test in a study of retail managers. Managers were part of a dedicated EI training program that met 1 day per week for 4 weeks with a 1 week hiatus between meetings to allow for the deliberate practice of the recently introduced EI behaviors. All training included the use of lectures, videos, practical exercises, role plays, and journaling, with emphasis placed on self-awareness, detachment, emotion regulation, emotion recognition, and empathy. Dulewicz et al. (2004) found that 8 out of the 15 subscales on the EQ-i were strengthened. Subscales such as Assertiveness, Self-Regard, Empathy, and Optimism all improved in the participants exposed to the training program, while no differences were evident in the control group.

Fletcher et al., (2009) demonstrated that emotional intelligence was modestly enhanced in UK medical students who were exposed to a 7-month EI training program that consisted of a 1 to 4 hour training session every month for 7 months. Two groups, a training group and a control group, completed the EQ-i on two separate occasions, with a comparison of pre- and post-test results nearing a 10-point difference on the total EQ-i score. A difference of this magnitude has been linked to meaningful and often observable behavior change (Bar-On, 1997). Similarly, Chang (2007) using an applied behavioral self-modification technique with students in a semester-long Psychology of Adjustment course focusing on assertiveness, empathy, self-regard, and emotion management, reported meaningful improvement on post-test EQ-i scores. Meanwhile, Sadri, Akbarzadeh, and Poushaneh (2009) reported elevated EI scores in male and female high school students after a 12-week training session.

The link between emotional intelligence and enhanced functioning and well-being lends itself to the ideal of training and development. Given that the application of deliberate EI training programs can yield noticeable differences in EI awareness and application, the utility of the EQ-i appears to extend beyond simply gaining insight into one's persona, to provide a framework by which one can maximize his or her potential.

Performance

The complex and unpredictable nature of high-pressure performance inside and outside of the sporting arena can prompt a heightened level of emotional reactivity, and the inability to cope may lead to undesirable and often unpredictable outcomes. A primary objective of performance psychology is to identify the intrapersonal characteristics and situational variables that interact to influence performance. Although much interest has been directed toward the situational factors affecting performance, it is of utmost importance to examine how dispositional variables (e.g., self-regard, optimism) mitigate these situational factors, as well as how the interaction between dispositional variables may in fact permit increases in meaningful and sustainable behavior change. Given the interactive effects of dispositional factors—of which emotion is of primary interest —and the vast array of situational variables facing the performer, inconsistent performance should not be altogether surprising. However, if we can better understand the mechanisms responsible for mediating the intrapersonal, interpersonal and situational variables affecting high-pressure behavior, we can better account for the interactive effects of the environment and dispositional characteristics on performance, permitting the development of a meaningful intervention. The construct of emotional intelligence (EI), which has received attention in both applied and academic text, has been demonstrated to offer such mediating effects.

Research has demonstrated that enhanced EI can augment human performance and the many tertiary factors related to success such as stress management, self-regard, flexibility,

and optimism. Given that the ability to understand and manage emotional information is a critical component of performance, the incorporation of the EQ-i (Bar-On, 1997) into applied practice provides an effective framework for skill development and performance enhancement.

For example, Perlini and Halverson (2006), in a study of National Hockey League (NHL) players, reported that these individuals score above the normative sample on total EQ-i and on three of the five composite measures, including the Intrapersonal, Stress Management, and the General Mood composites. This finding suggests that how an athlete perceives him or herself regulates the stress associated with elite-level performance, and how equipped he or she is with coping skills can translate into enhanced performance. However, an investigation of NCAA Division 1 athletes reported no differences in emotional intelligence between athletes and the normative population (Schwartz, 2008). Although such results are conflicting, it can be argued that performing at a truly elite level, such as in the NHL, requires a different set of skills than is required to perform at the collegiate level.

Pre-competition anxiety has often been associated with performance decrements in elite sport associated with the misallocation of attention, ineffective energy management, and decreased confidence. Independent sport research has reported that those athletes with higher levels of EI report less pre-competition anxiety in the moments leading up to competition (Lu, Li, Hsu, & Williams, 2010). The strong relationship between the Intrapersonal, Interpersonal and Stress Management Composite scales suggests that emotional intelligence can help mitigate the negative effects of performance anxiety. Similar results have been reported with combat sports (Gervais, 2008), golfers (Mousseau, 2008), and pilots (Logan, Papadogiannis, Stein, & Gorewich, 2008).

The link between emotion and attention has been long considered an integral component of performance success (Nideffer, 1976). That is, as emotions escalate, attention may be adversely affected, broadening to a point of distractibility or excessively narrowing to a point at which relevant performance cues are overlooked. As such, attention control training has garnered significant research energy and recently it has been argued that emotional intelligence may provide a framework for enhancing attention allocation (Papadogiannis, Logan, Mann, & Escobar, 2009). The study of pilots and athletes provides two distinct populations that are regularly immersed in high pressure environments, requiring emotional skills to sustain and even enhance performance. Within these groups Papadogiannis et al. (2009) assessed the relationship between emotional intelligence (EQ-i; Bar-On, 1997) and attentional skills (TAIS; Neideffer, 1976). Both the pilot and athlete groups reported higher Total EI, Emotional Self-Awareness, Stress Tolerance, and Impulse Control scores on the EQ-i, coupled with lower Internal and External Distractibility scores on the TAIS. These findings support the idea that emotional intelligence is associated with reduced distractibility in complex performance environments.

Job Satisfaction/Organizational Climate/Change

The EQ-i has proven to be an effective and versatile tool for use in the corporate environment. The EQ-i has been used as an employee screening tool (Bachman, Stein, Campbell, & Sitarenios, 2000), and it enhances the reliability and effectiveness of the employee recruitment and selection process (Durek & Gordon, 2009). A number of EQ-i factors have been shown to be directly related to performance success in a variety of domains, including sales (Harris, 2009; Mulligan, 2004; Sitarenios & Stein, 1998), medicine (Fletcher, Leadbetter, Curran, & O'Sullivan, 2009), sport (Perlini & Halverson, 2006), academic performance (Parker et al., 2004; Parker, Hogan, Eastabrook, Oke, & Wood, 2006; Walker, 2007), and persistence (Giroir, 2010). Assertiveness, empathy, happiness, emotional self-awareness, and problem solving have all been linked to recruitment success within the US Air Force (Handley, 1997). Success, job satisfaction, and adaptation to organizational climate change can be predicted by looking at any number of EQ-i factors.

In a similar vein, the EQ-i has been used to evaluate and enhance the ongoing functioning and well-being of employees at critical and arbitrary stages of employment. Furthermore, the EQ-i has been used for gauging the impact and effectiveness of organizational change and job satisfaction (Engstrom, 2005; Thiebau, Breton, & Richoux, 2005), and collaborative conflict resolution (Malek, 2000). The EQ-i also enables the qualified professional to create tailor-made training programs to improve the emotional skills and functioning of individual employees or, on a larger scale, with the organization as a whole (Elfenbein, 2006; Frye, Bennett, & Caldwell, 2006; Hughes & Terrell, 2007).

Similar to the Myers-Briggs Type Indicator (MBTI; Myers & McCulley, 1985), the EQ-i has also been used in group and team building contexts (Hughes & Terrell, 2007). Particularly useful in this domain has been the EQ 360, a multi-rater feedback assessment that provides unique and rich insight into the strengths and weaknesses from a self/other's perspective (Bar-On & Handley, 2003; Waddell, 2010). Without question, a large part of effective and cogent teamwork is knowing each member's strengths and limitations as well as having an appreciation for how others perceive themselves and those with whom they interact. Such insight permits each member to leverage the strengths from the individual or group whenever possible. Pinpointing and utilizing this type of information has proven effective for bonding, unifying, synchronizing , and strengthening a group or team (Hughes & Terrell, 2007; Hughes, Thompson & Terrell, 2009).

EI and the Brain

A wealth of information has been generated over recent years concerning the emotional implications for performance success and the role emotions play in survival and everyday decision making. Recent technological advances in the study of emotion (e.g., fMRI, EEG, etc.) have shed light on the cortical and sub-cortical structures of the brain linked to the emotion-network that drives how we think, feel, and act. Of particular interest are the sub-cortical structures of the thalamus, cingulate cortex, amygdala and the cortical regions, such as the temporal lobe and the pre-frontal cortex. In the event one of these areas should become impaired, so too does the individual's ability to process or use information effectively, often affecting thoughts, feelings, and actions. This structure-function relationship maintains implications for stress tolerance, well-being, decision-making, and success. To date, however, little empirical research has directly linked EI to the very neural mechanisms that have been demonstrated to have a direct impact on what we perceive, how we react, the decisions we make, and ultimately the quality of life we lead.

According to the somatic marker hypothesis (Damasio et al., 1991), when we make a decision we first weigh the pros and cons or the benefits/consequences of the response options, a process that requires both emotional and cognitive processing. When faced with a simple choice, however, we often resort to cognitive rules to assist in the decision process; as the decision becomes more complex or we place greater value on the outcome, our cognitive rules may not be sufficient to render a decision and we get stuck!

Somatic markers are simply connections between a stimulus (i.e., choice) and a resulting physiological sensation we experience when presented with such a stimulus. When presented with a given stimulus, we experience certain sensations which in turn bias or influence our decisions. In most cases, the somatic marker directs attention to the most meaningful information to enhance decision making (Damasio et al., 1991); however, in the event a deficit in emotional processing is evident, decision making and judgment become impaired.

Bar-On et al., (2003) set out to determine whether individuals with impaired somatic markers (i.e., lesions to the ventromedial prefrontal cortex; VMPFC) would reflect that impairment through abnormal emotional intelligence. In this case, damage to the VMPFC is often associated with impaired judgment and decision-making and, in turn, should be reflected by lower scores in EI. Comparing patients with lesions to various brain regions, Bar-On et al., (2003) demonstrated that those with lesions to the VMPFC reported lower EI despite showing no difference in IQ. Given the implications of VMPFC in the somatic marker hypothesis for decision making and subsequent behavior, Killgore and Yurgelon-Todd (2007) set out to assess the link between VMPFC activation (measured using fMRI) and levels of emotional intelligence. Similar to the results of Bar-On (2003), Killgore and Yurgelon-Todd reported that adolescents with relatively low emotional intelligence respond to emotionally provocative pictures with greater and more extensive brain activation than do those with well-developed emotional intelligence. In other words, emotional intelligence can moderate the impact of stressful stimuli, allowing the brain to operate more efficiently under stressful conditions (Haier et al., 1992).

Damage to temporal lobe functioning has been reliably linked to increased agitation, difficulty managing emotions, heightened irritability and, more recently, impaired social cognition (Walpole, Isaac, & Reynders, 2008). If damage or functional impairment of the temporal lobe presents emotional challenges, then perhaps the temporal region of the brain is linked to EI. Walpole et al., (2008) in a controlled experiment measured the emotional intelligence of patients with temporal lobe epilepsy and a healthy cohort matched for age and IQ. These findings suggest that impairment to the medial temporal lobe is related to lower emotional intelligence and impaired facial recognition, and to greater psychological distress as compared to healthy individuals.

To this point, emotional intelligence has been linked to VMPFC and the temporal lobe by means of comparing relatively healthy individuals to those with a structural deficit. In a series of studies conducted by Killgore and colleagues (Kahn-Greene, Lippizzi, Conrad, Kamimori, & Killgore, 2006; Killgore, Kahn-Greene, Lipizzi, Newman, Kamimori, & Balkin, 2008; Killgore, Killgore, Day, Li, Kamimori, & Balkin, 2007) healthy participants were used in a repeated measures design to isolate the simulated effects of VMPFC impairment on emotion functioning. Killgore et al., (2008) were able to demonstrate the cortical connection of emotional intelligence to the prefrontal cortex via sleep deprivation. It has been shown that sleep deprivation can result in temporary impairment of the prefrontal cortex, resulting in difficulties regulating higher-order executive functions such as impulse control, inhibition of aggression, willingness to act in a socially acceptable way (Kahn-Greene et al., 2006), and moral judgment (Killgore et al., 2007). When comparing sleep deprived EQ-i results to baseline results, sleep deprived participants reported decreased Total EQ, Intrapersonal, Interpersonal, and Stress Management Composite scores (Killgore et al., 2008), and those scoring lower at baseline were more susceptible to decrements in moral judgment performance (Killgore et al., 2007).

Although the neurological work investigating the substrates of emotional and social intelligence is relatively young, the results show promise for enhancing our understanding of the role emotional intelligence plays in our capacity to meet our daily demands. Emotional intelligence appears to have a broad neurological representation which, in turn, serves to moderate the effects of emotional stimuli affecting both our decisions and behaviors.

Summary

Emotional intelligence has reached a level of maturity stemming from a wealth of research, a broad range of applications, and vast user experiences. The evolution of emotional intelligence will continue as the links between emotional intelligence and successful performance become better understood and researchers continue to push the boundaries of our understanding. In the meantime, the information that has been gleaned from research spanning more than two decades on the EQ-i was used as a catalyst to refine the operational definition of emotional intelligence, culminating in the EQ-i 2.0.

CHAPTER 3

The EQ-i 2.0 Framework

Since the seminal work of Bar-On (1997, 2004), interest in emotional intelligence has continued to blossom. In response to the vast research that has emerged over the years, the operational definition of emotional intelligence has evolved, affecting the conceptual model of emotional intelligence and driving the need to reconsider empirically the factor structure of the EQ-i® (Bar-On, 1997). The final form of the EQ-i® 2.0 consists of 133 items, representing 15 subscales (with 7 to 9 items per subscale), a Well-Being Indicator and 3 Validity Indicators, teamed with a corresponding 360 degree assessment that is designed to complement the EQ-i 2.0.

Although based on the original factor structure of the EQ-i (Bar-On, 1997), the EQ-i 2.0 and EQ 360® 2.0 are the products of several model changes that are deemed practically, empirically, and theoretically sound. A side-by-side comparison of the EQ-i factor structure to that of the EQ-i 2.0 can be seen in Figure 3.1. The process used to arrive at the conceptual changes has involved many steps, including item analyses, item development, data collection and analysis, and expert reviews. A detailed description of the Stages of Development can be found in chapter 12 (Stages of Development) and statistical support for the model changes can be found in chapter 13 (Standardization, Reliability, and Validity).

It is the goal of this chapter to highlight the major changes to the model of emotional intelligence, including changes to the operational definition of emotional intelligence and the realignment of the Intrapersonal, Adaptability, Stress Management, and General Mood Composite scales, while addressing modifications to their underlying subscales.

The realignment of the composite scales and subscales yields a model of emotional intelligence that is even more intuitive than its predecessor. The total EI score is considered a snapshot of one's overall emotional intelligence and potential for effective emotional and social functioning. The EI composite and subscales provide an opportunity to look deeper into the underlying facets of emotional intelligence that drive behavior. The following structural and alignment changes of the EQ-i have resulted in a model better equipped to serve this purpose.

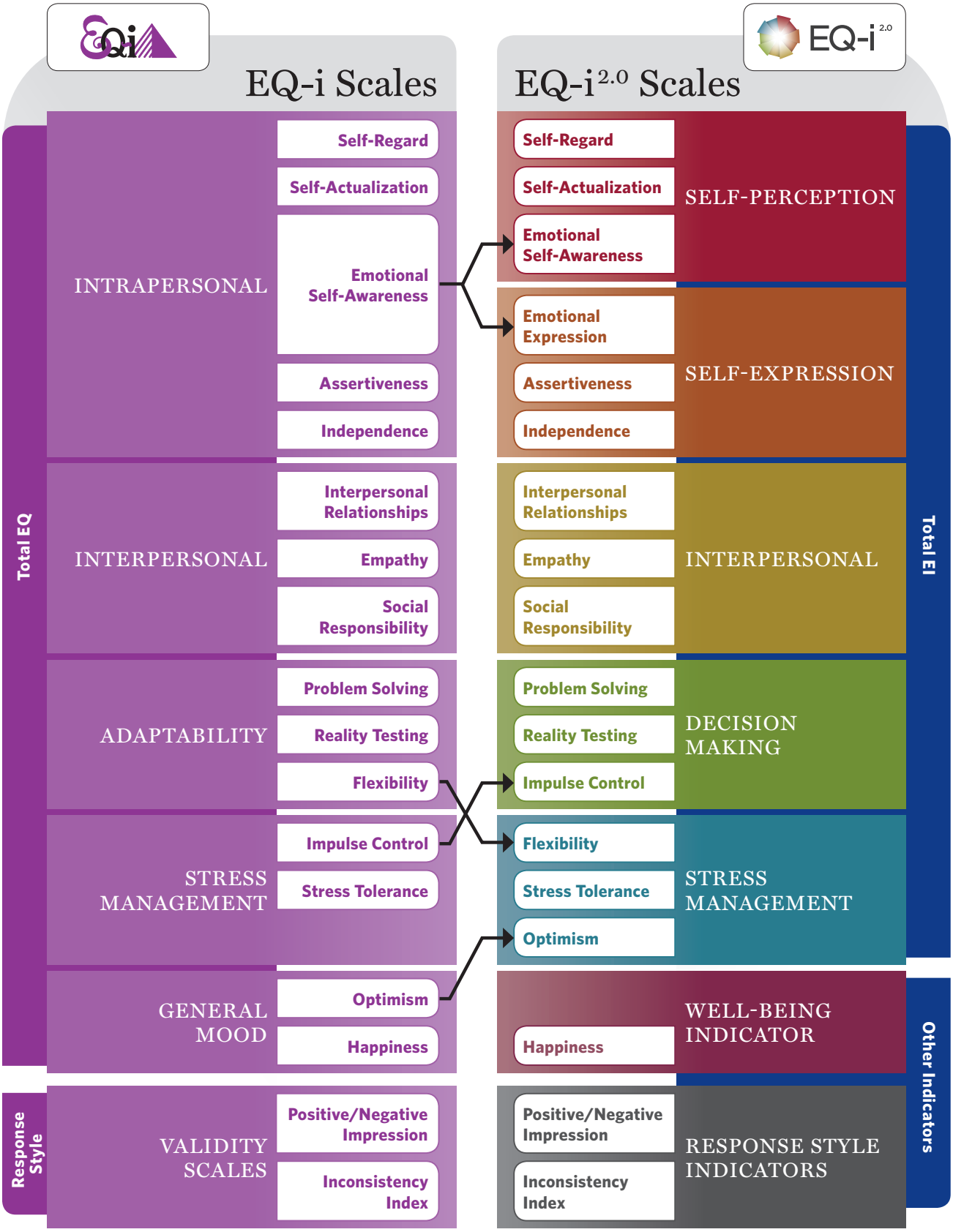
Intrapersonal Composite. The Intrapersonal Composite scale of the EQ-i was initially comprised of two related but functionally unique content areas: self-awareness and self-expression. The rich information provided by the combination of the Self-Regard, Self-Actualization, and Emotional Self-Awareness subscales spawned insight into how a given individual perceived him or herself. While the combination of Assertiveness and Independence reflected how one presented one's internal self to the external world, these areas did not directly assess the overt expression of emotions. Previously, the Emotional Self-Awareness subscale captured how one not only perceived, but also expressed, oneself.

Upon reflection, consultation, and further data analysis, a logical divide became evident: split the Intrapersonal Composite scale to more specifically and deliberately address how one perceives oneself, and complement that composite scale with a new composite scale capturing how this internal perception is expressed. As a result, the Intrapersonal Composite scale was divided, and the Self-Perception and Self-Expression Composite scales were born.

To fully account for this division, the content of the Emotional Self-Awareness subscale now needed to conform to the new factor structure. The items pertaining to self-awareness were retained and now reside in the Emotional Self-Awareness subscale of the Self-Perception Composite. The self-expression items were also retained and expanded to better address how one expresses oneself, inspiring the addition of the Emotional Expression subscale. The end result captures the essence of emotional perception and emotional expression by way of two unique but related composite scales, each containing three subscales (Figure 3.2).

Interpersonal Composite. The Interpersonal Composite scale of the EQ-i was designed to address one's ability to develop and maintain mutually satisfying relationships; remain comfortable and competent while meeting and relating to others; and be a contributing and effective member of one's social group. The inclusion of the Interpersonal Relationships, Empathy, and Social Responsibility Subscales proved to be a powerful component of emotional intelligence. Although minor changes to the items were made, this composite scale was left intact.

Figure 3.1. A comparison of the EQ-i and the EQ-i 2.0



Adaptability and Stress Management Composite. Two defining aspects of emotional intelligence include how well we cope with our daily demands and pressures, and how effectively we use emotional information to optimize our decision making process.

The Impulse Control and Stress Tolerance subscales combined to provide insight into how well one could tolerate stress without experiencing significant setbacks, falling apart, or even losing control. Although beneficial, the Stress Management Composite did not include the mechanisms that could help an individual buffer stress or otherwise cope with arguably the greatest source of stress: change. Upon reflection and data analysis it seemed that in order to better address the needs of a Stress Management Scale, a natural psychological buffer was necessary, as was the need to address one's capacity to cope with change. As a result, the Stress Management Composite was restructured to include Optimism (a natural factor for enhancing one's ability to tolerate, and remain resilient in the face of stress), Flexibility (ability to adapt to change), and Stress Tolerance (ability to cope with and manage stress).

It was also recognized that well established emotional intelligence includes the ability to use emotional information to optimize decision making, and that the Adaptability Composite could be restructured to cover this key element and provide enhanced utility to the end user. The Decision Making Composite was established and consists of the three subscales of Problem Solving, Reality Testing, and Impulse Control. Together the three subscales capture the process one is likely to use when making decisions. The application of emotional information (Problem Solving), while remaining objective (Reality Testing), paired with the ability to delay immediate gratification (Impulse Control) when necessary, provides the foundation for making effective decisions.

The realignment and restructuring of the Adaptability and Stress Management Composite scales (Figure 3.3) has resulted in the formation of the Decision Making Composite, which is intuitive, easy to coach, conceptually sound, and addresses a key element of functioning. As well, there is a more structurally sound and practical Stress Management Composite. The notion of Adaptability is still deemed important but, defined broadly, the construct of adaptability runs across the many facets of emotional intelligence.

General Mood. The General Mood Composite has long been considered a barometer of one's overall emotional intelligence. After all, emotional intelligence is an indicator of social and emotional effectiveness and well-being. However, the General Mood Composite - made up of Optimism and Happiness – can be considered a product of one's emotional intelligence. Although optimism and its associated behaviors can be taught, acquired, and developed, happiness on the other hand is a direct by-product of many other behaviors, beliefs, and attitudes. As a result, it was determined that Optimism served a greater function in the Stress Management Composite, leaving Happiness as an isolated factor. Given the unique information that the Happiness subscale brings to the EQ-i, it needed to be retained.

In recent years, an abundance of research into happiness has appeared in academic and mainstream chronicles, with a common message: "Happiness is essential to well-being and quality of life, but you don't just become happy." Happiness is an attitude and a by-product of other psychological skills that one has at his or her disposal (Davidson & Lutz, 2008; Flora, 2009; Seligman, 2002). Happiness can be considered a consequence of emotional intelligence and, as a result, has been retained as a well-being indicator: a measure of one's feelings of satisfaction and contentment.

The EQ-i 2.0 Model of Emotional Intelligence

The heart and soul of the EQ-i 2.0 resides in its conceptual framework, a framework that is based on the original EQ-i model (Bar-On, 1997) and continues to provide unique access into one's emotional and social functioning and well-being. This section is designed to provide a thorough understanding of the conceptual view of emotional intelligence as measured by the EQ-i 2.0, including the operational definitions of the many components being measured. Mastering an understanding of the conceptual framework of the EQ-i 2.0 is the first step in the successful application of the tool and provides the basis for evaluating and interpreting results.

Not unlike the need to update and improve the EQ-i itself, it is necessary to consider the overarching framework that guides these changes. Recent advances in both the research and practice of emotional intelligence have resulted in a deeper understanding of what emotional intelligence is, what it looks like, how we talk about it, and ultimately how it can be captured, resulting in a need to refine our working definition. In response to these advancements ***Emotional Intelligence*** is defined as

> ...a set of emotional and social skills that influence the way we perceive and express ourselves, develop and maintain social relationships, cope with challenges, and use emotional information in an effective and meaningful way.

Emotional intelligence (EI) —as defined here and applied in the Emotional Quotient Inventory (EQ-i 2.0) —reflects one's overall well-being and ability to succeed in life. The richness of this operational definition is reflected in one's level of functioning at the composite level and further enhanced by an understanding of the interconnectedness of the 15 different factors that comprise the EQ-i 2.0.

Figure 3.2. The realignment of the Intrapersonal Composite Scale

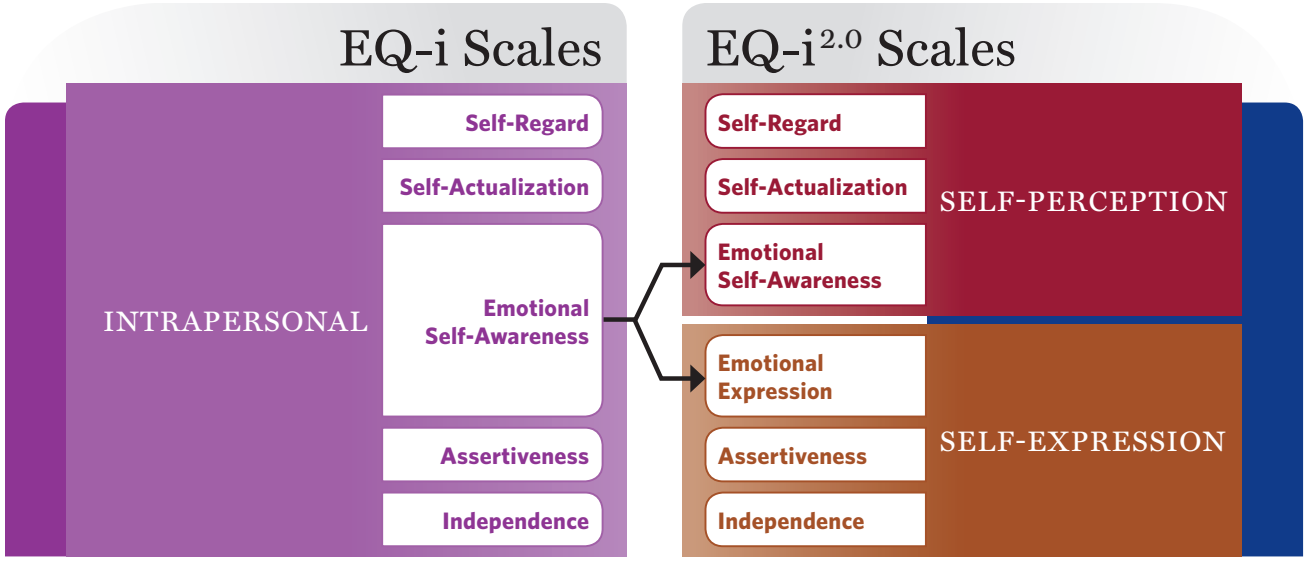


Figure 3.3. Realignment and restructuring of the Adaptability and Stress Management Composite Scales

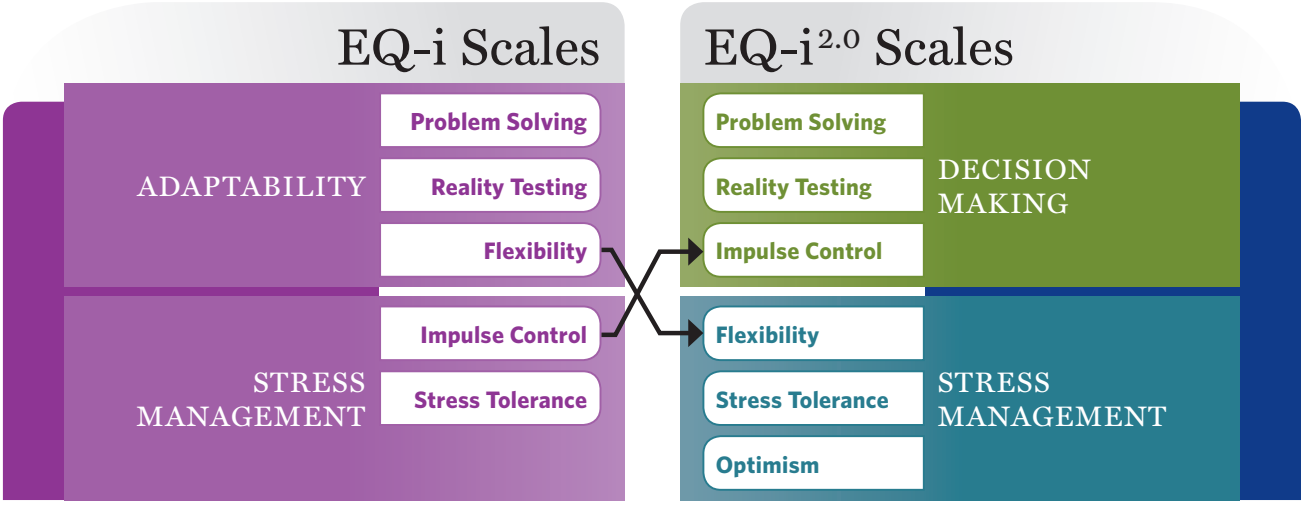
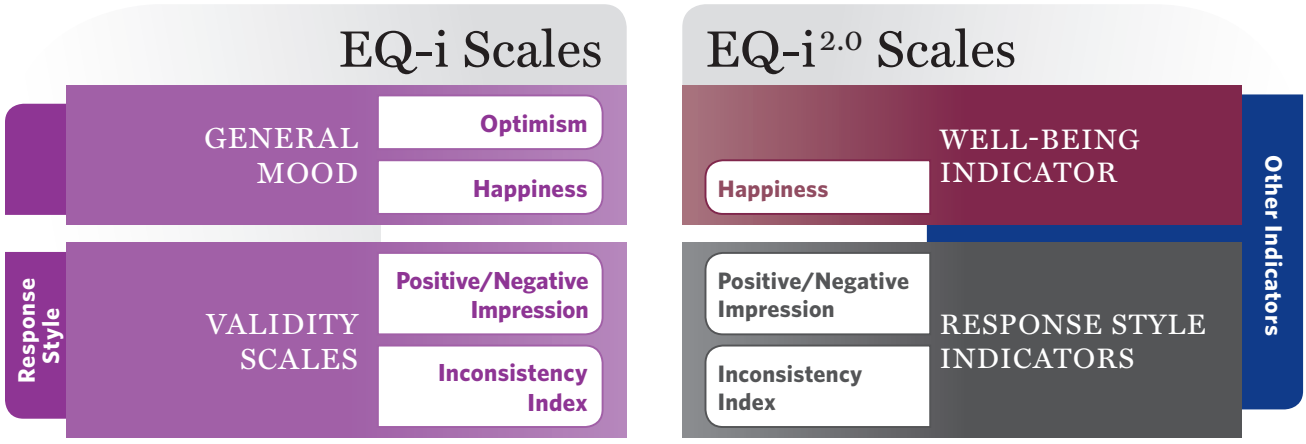


Figure 3.4. Realignment and restructuring of the General Mood Composite Scale



It is of paramount importance that the coach, consultant, counselor, or practitioner understands that, although emotional intelligence is a significant predictor of personal and professional success and well-being, emotional intelligence does not operate in a vacuum. Emotional intelligence combines with other important attributes, such as genetic predispositions, intellectual capacity, trained skills, motivation, and environmental factors, all of which together impact one's propensity for success and well-being. This approach is in agreement with the "interaction position" adopted by Bem and Allen (1974), which stressed that assessment must seriously attend to personal factors and environmental situations to predict behavior. Epstein (1979) further emphasized this position, underscoring that the question of whether a given situation or the person involved in it is more important is meaningless, because behavior is always the complex interaction between the person and the situation. As a result, it is moot to talk about characteristics of an individual's behavior without specifying and gaining an understanding of the situation in which the behavior occurs.

The framework from which the EQ-i 2.0 is derived identifies 15 separate but related factors that provide structure for the meaningful interpretation of the interaction between a person and his or her environment. In essence, the 1, 5, 15, factor model of the EQ-i 2.0 relates to an individual's potential for success and well-being, and is not a direct measure of it. As a result, a thorough understanding of the EQ-i 2.0 framework provides invaluable insight into a person's potential: it sheds light onto the depth and breadth of his or her processes for dealing with thoughts, feelings, and emotions, and for interacting with the outside world.

The following section expands on the operational definition of EI that provides the foundation for the EQ-i 2.0, including a description of the five composite factors and their respective subscales. The composite scales are designed to provide a 'macro' perspective on one's level of emotional and social functioning by giving insight into the individual's perception of his or her inner self; the outward expression of this perception; and his or her ability to establish and maintain relationships, apply emotional information, and cope with and manage stress. Each composite scale is comprised of a subset of skills that provide the functional utility of the EQ-i 2.0 (Figure 3.5).

The 15 subscales provide the EQ-i 2.0 with the functional utility that coaches, counselors, HR professionals, and corporate executives have come to expect. Emotional skills and emotional intelligence develop over time, with experience, and in direct relation to deliberate practice. Each of the subscales of the EQ-i 2.0 sheds light onto the many emotional facets related to well-being and performance; as a result, both well-being and performance can be enhanced when an individual learns how to leverage his or her natural strengths while gaining a greater understanding of — and developing the skills to evolve — the areas of emotional intelligence that are underutilized (Figure 3.6).

Figure 3.5. Factor Structure of the EQ-i 2.0

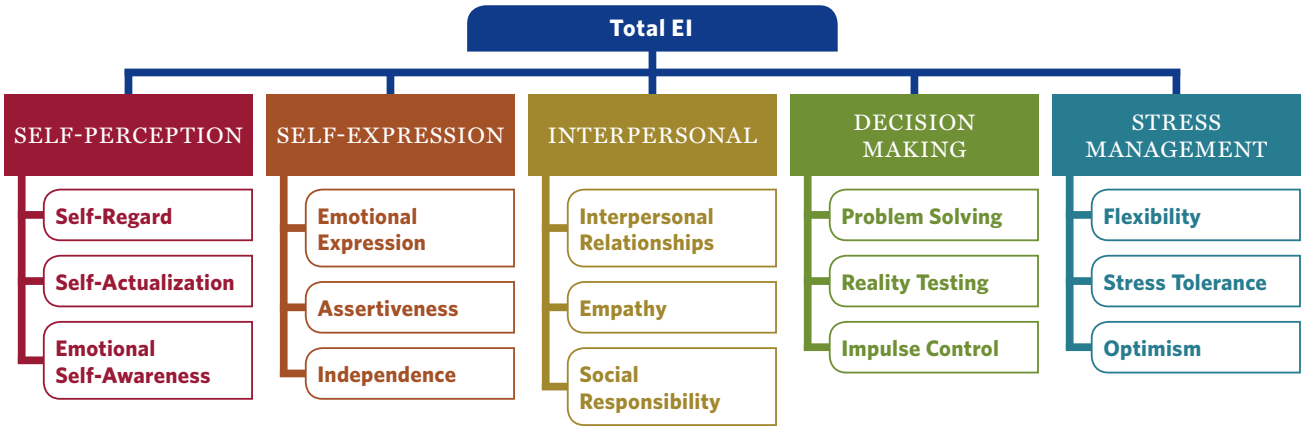
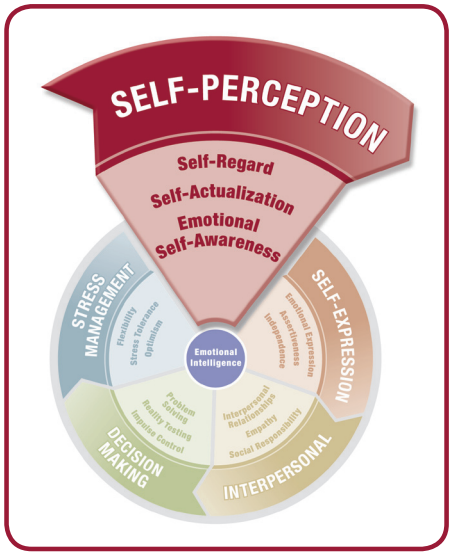


Figure 3.6. EQ-i 2.0 Model of Emotional Intelligence

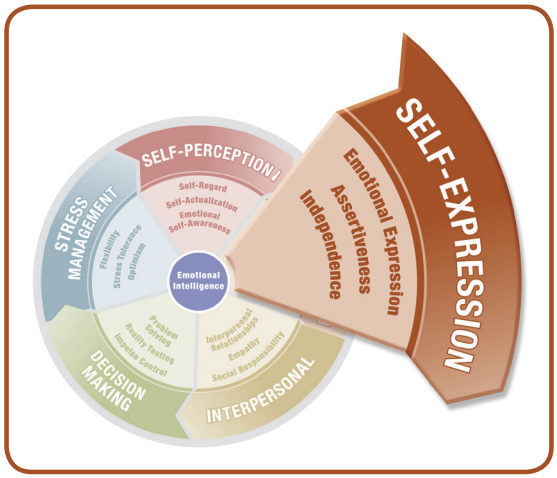
Self-Perception

This facet of emotional intelligence addresses the inner self. The subscales include Self-Regard, Self-Actualization, and Emotional Self-Awareness, which together are designed to assess feelings of inner strength and confidence, persistence in the pursuit of personally relevant and meaningful goals, and an understanding of what, when, why, and how different emotions impact thoughts and actions.

Self-Regard is respecting oneself while understanding and accepting one's strengths and weaknesses. Self-Regard is often associated with feelings of inner strength and self-confidence. Self-acceptance is the ability to accept one's perceived positive and negative aspects as well as one's limitations and possibilities. This component of emotional intelligence is associated with general feelings of security, inner strength, self-assuredness, self-confidence, and self-adequacy. Feeling sure of oneself is dependent upon self-respect and self-esteem, which are based on a well developed sense of identity. A person with a well-developed self-regard feels fulfilled and satisfied with him or herself. At the opposite end of the continuum are feelings of personal inadequacy and inferiority.



Self-Actualization is the willingness to persistently try to improve oneself and engage in the pursuit of personally relevant and meaningful objectives that lead to a rich and enjoyable life. Striving to actualize one's potential involves engaging in enjoyable and significant activities and making a lifelong and enthusiastic commitment to long-term goals. Self-actualization is an ongoing, dynamic process of striving toward maximum development of one's abilities, capacities, and talents. This component of emotional intelligence is associated with persistently trying to do one's best and improve oneself in general. Self-actualization is associated with feelings of self-satisfaction.



Emotional Self-Awareness includes recognizing and understanding one's own emotions. It involves the ability to differentiate between subtleties in these emotions, while being aware of their causes and the impact they have on the thoughts and actions of oneself and others. At the core of emotional self-awareness is the ability to know what one is feeling and why, while being able to recognize and understand the source of those feelings.

Self-Expression

The Self-Expression Composite scale is an extension of Self-Perception and addresses the outward expression or the action component of one's internal perception. This facet of emotional intelligence is comprised of Emotional Expression, Assertiveness, and Independence. It assesses one's propensity to remain self-directed and openly expressive of thoughts and feelings, while communicating these feelings in constructive and socially acceptable ways.

Emotional Expression is openly expressing one's feelings verbally and non-verbally. Emotional expression extends beyond the simple overt expression of one's feelings, to include the communication of those feelings in a manner that can be understood and experienced by the recipient.

Assertiveness involves communicating feelings, beliefs, and thoughts openly, and defending personal rights and values in a socially acceptable, non-offensive, and non-destructive manner. Assertiveness is a complex and essential component of emotional intelligence that transcends one's ability to express emotion. Assertiveness includes the expression of feelings, but further encompasses one's ability to openly express thoughts, beliefs, and ideas, even in the face of adversity, and to defend and stand up for one's personal rights.

Independence is the ability to be self-directed and free from emotional dependency on others. Decision making, planning, and daily tasks are completed autonomously. Independent people are self-reliant in planning and making important decisions; however, highly independent individuals may seek and consider the opinions of others before making the best decision. Seeking consultation or advice and gathering information are not signs of dependency. Independence is the ability to function autonomously without protection and support: independent people avoid clinging to others to satisfy their emotional needs.

Interpersonal

The Interpersonal Composite scale includes Interpersonal Relationships, Empathy, and Social Responsibility. This facet of emotional intelligence measures one's ability to develop and maintain relationships based on trust and compassion; articulate an understanding of another's perspective; and act responsibly while showing concern for others, a team or a greater community/organization.

Interpersonal Relationships refers to the skill of developing and maintaining mutually satisfying relationships that are characterized by trust and compassion. Mutually satisfying relationships include social interchanges that are potentially meaningful, rewarding, and enjoyable. Among positive interpersonal relationship skills are the ability to connect with others by remaining open and by a willingness to both give and receive affection and intimacy; and the ability to remain at ease and comfortable in social situations. This emotional skill requires sensitivity toward others, the desire to establish meaningful relationships, and the ability to feel satisfied with relationships.

Empathy is recognizing, understanding, and appreciating how other people feel. Empathy involves being able to articulate your understanding of another's perspective and behaving in a way that respects others' feelings. At the core of empathic behavior is being able to perceive and appreciate what, how, and why people feel the way they do - being able to emotionally "read" other people - while demonstrating an interest in and concern for others.

Social Responsibility is willingly contributing to society, to one's social groups, and generally to the welfare of others. Social Responsibility involves acting responsibly, having social consciousness, and showing concern for the greater community.

Decision Making

The Decision Making Composite scale addresses the ways in which one uses emotional information. This facet of emotional intelligence includes Problem Solving, Reality Testing, and Impulse Control. Collectively, this composite scale reveals how well one understands the impact emotions have on decision making, including the ability to resist or delay impulses and remain objective in order to avoid rash behaviors and ineffective attempts at problem solving.

Problem Solving is the ability to find solutions to problems in situations where emotions are involved. Problem solving includes the capacity to understand how emotions impact decision making. Problem solving is a complex and even multiphasic process. It is not about neutralizing emotion, but about using emotional information to enhance the process of recognizing a problem, feeling confident in one's ability to work through it, defining the problem, generating a solution, and implementing the plan. The appropriate application of emotional information can help identify potential pitfalls, inspire the recruitment of help, and even expedite the solution by evoking feelings of confidence. Problem solving is about understanding the impact that emotions have on the decision making process and using those emotions most effectively.

Reality Testing is the capacity to remain objective by seeing things as they really are. This involves recognizing when emotions or personal bias can cause one to be less objective. Reality testing involves the active search for objective information to confirm, support, justify, and validate feelings, perceptions and thoughts. Strong reality testing skills allow one to keep things in the proper perspective and experience things as they really are, without fantasizing, daydreaming, or attaching wants, desires, and ideals to a context. An important aspect of reality testing involves the ability to concentrate and remain focused when presented with emotionally evocative situations. In essence, reality testing is all about perception, clarity, and objectivity.

Impulse Control is the ability to resist or delay an impulse, drive, or temptation to act. It involves avoiding rash behaviors and impetuous decision making. Impulse control entails a capacity for recognizing and accepting one's desire to react without becoming a servant to that desire. Difficulties in impulse control are manifested by low emotional threshold, impulsiveness, loss of self-control, and unpredictable behavior.

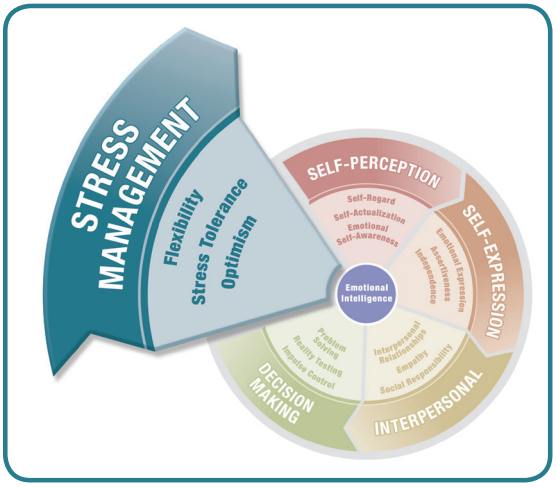
Stress Management

The Stress Management Composite scale is comprised of Flexibility, Stress Tolerance, and Optimism. Collectively, this facet of emotional intelligence addresses how well one can cope with the emotions associated with change and unfamiliar or unpredictable circumstances, while remaining hopeful about the future and resilient in the face of setbacks and obstacles.

Flexibility is adapting emotions, thoughts and behaviors to unfamiliar, unpredictable, and dynamic circumstances or ideas. This component of emotional intelligence refers to one's overall ability to adapt and tolerate the stress that accompanies change. Flexible people are agile and capable of reacting to change with minimal adverse effect; they are open to and capable of change, and tolerant of new ideas, orientations, and practices.

Stress Tolerance involves coping with stressful or difficult situations and believing that one can manage or influence those situations in a positive manner. This component of emotional intelligence is multifaceted: one's stress tolerance depends on being equipped with the necessary and relevant coping skills; maintaining a belief that one can handle the situation; and feeling confident that one can have a positive impact on the outcome. Stress tolerance is very much related to resilience and, when coupled with optimism, is a strong indicator of one's ability to effectively deal with problems and crises (as opposed to surrendering to feelings of helplessness and hopelessness). When stress tolerance is low, anxiety is likely, which can have negative effects on well-being, concentration, and ultimately performance.

Optimism is an indicator of one's positive attitude and outlook on life. It involves remaining hopeful and resilient, despite occasional setbacks. Optimism assumes a measure of hope in one's approach to life. It is a positive approach to daily living and a significant component of resilience and well-being.



Well-Being Indicator

Previously, the EQ-i included Happiness as one of the 15 components of emotional intelligence. The EQ-i 2.0 has been modified to include and view happiness more as a product of emotional intelligence and less as a contributing factor. That is, generally speaking, people who have reported higher EI scores on the EQ-i were more likely to also report higher happiness scores, and those with lower EI scores were more likely to report lower happiness scores. Given this trend, coupled with the fact that most coaches, consultants, and counselors find it difficult to directly coach to happiness, the decision was made to move happiness away from representing a component of EI to more appropriately represent a reflection of one's well-being. As a result, the Well-Being Indicator was born. The exploration of the Well-Being Indicator included a detailed look into the relationship between one's level of happiness and all the other facets of emotional intelligence. The result of a series of theoretical, practical, and empirical analyses identified Self-Regard, Optimism, Interpersonal Relationships, and Self-Actualization as key facets of emotional intelligence with direct connections to happiness and well-being that can be developed by effective coaching practices and positive change.

Each report will consist of a Happiness score. This score is generated in the same manner as all other EQ-i 2.0 subscales. Interpretation text is provided that incorporates feedback from the four aforementioned subscales (SR, OP, IR, SA) which are most intimately connected to happiness and subsequent well-being. As a result, the Well-Being Indicator presents a great place for addressing the correlates to happiness.

Happiness is an indicator of emotional health and well-being. It is characterized by feelings of satisfaction, contentment, and by the ability to enjoy the many aspects of one's life.

The summation of literature, client feedback, and empirical reviews resulted in modifications to the operational definition of Emotional Intelligence. Such changes have implications on the practical application of the EQ-i and, as a result, extensive work was undertaken to revise the factor structure underpinning the EQ-i. The resulting model of the EQ-i 2.0, yields a framework that is not only valid and reliable, but offers greater applicability in the practice of emotional intelligence.

II

Administering a Self-Report EQ-i 2.0

By providing an overview of the EQ-i 2.0 process, the goal of this section is to familiarize the user with principles of test administration.

Chapter 4 presents guidelines for effective use of the tool. A six-step process is outlined in order to maximize its utility. Step one involves identifying client needs in order to tailor use of the EQ-i 2.0 or EQ 360 2.0 to specific requirements. Step two involves demonstrating the value of the tool for the client. Step three outlines methods to gain client and organizational buy-in and support. Step four stipulates information to be included in a written contract. The intent of the contract is to clarify the purpose of using the assessment tool for the client. Step five involves administering the tool and step six details a process of follow-up and evaluation.

Chapter 5 explains setup and scoring information. Details of the online EQ-i 2.0 test administration portal are presented. Guidelines regarding the administration procedure (inviting participants, managing the account and creating reports) are outlined. In order to demystify the test's purpose, suggestions are put forth to prepare the client for taking the EQ-i 2.0. A more detailed look at the simple and straightforward invitation procedure is specified. The process of completing the online assessment and of producing reports for the client (i.e., the respondent) and coach (i.e., the qualified practitioner interpreting the test) is summarized. A description of default report settings and of ways to tailor the report according to your client's needs is demonstrated.

CHAPTER 4

Planning the EQ-i 2.0 Assessment Process

The EQ-i® 2.0 was developed so that it can be used for many different purposes (e.g., leadership development, life coaching, employee selection) across a variety of settings, industries and cultures. While there is no doubt that this level of flexibility in an assessment tool is of a huge benefit to practitioners and researchers alike, it comes with the caveat that the *right plan* needs to be in place before the EQ-i 2.0 is administered to ensure that it is set up for success.

The EQ-i 2.0 can generally be classified as a test used for personal awareness, growth and action as individuals are able to identify their own strengths and weaknesses around Emotional Intelligence (APA, 1999). Although personal insight is highly educational and interesting, if sustainable personal or organizational change is required, the EQ-i 2.0 itself must be bolstered with stakeholder support and a solid plan for execution.

The guidelines presented in this chapter bring together psychological testing standards jointly developed by the American Psychological Association, the American Educational Association and the National Council on Measurement in Education (APA, 1999) with best practices in organizational development, performance coaching, leadership development and training design. The intention is to provide an ethical yet impactful process for using the EQ-i 2.0 in a way that facilitates behavior change.

Guiding Principles of Use

It is recommended that the EQ-i 2.0 be used as part of a larger evaluation process, alongside other assessment methods and needs analysis techniques (e.g., interviews, focus groups, and behavioral observations) when available. Moreover, EQ-i 2.0 results should be viewed as important points of data that should be further explored and examined through additional methods with the aim of gaining a broad and balanced picture of the person being assessed.

Decisions or judgments should never be made on the basis of an EQ-i 2.0 score alone. A skilled interpreter may form hypotheses, research questions or coaching ideas based on the client's scores, but these should always be further investigated through the debrief process and/or against other assessment methods.

Since the EQ-i 2.0 is a self-report measure, it is not recommended for people who are unwilling or unable to respond honestly to the test items. As will be described in more detail in this chapter, you should be aware of cultures, conditions or constraints in organizations that may make it difficult for participants to respond openly and honestly to the EQ-i 2.0.

The EQ-i 2.0 is not recommended for individuals who are:

- Random responding
- Disoriented or severely cognitively or emotionally impaired
- In a situation where there is pressure to respond in a given way
- Under 18 years old
- Unable to read at the EQ-i 2.0 reading level (3rd-4th Grade)

The EQ-i 2.0 should always be administered with a plan and a purpose. At a very rudimentary level, the EQ-i 2.0 requires that an individual be open about himself or herself by divulging personal information in response to the items. In most cases, this personal information is then interpreted by someone who is unknown to the test taker. As such, administering the EQ-i 2.0 should never be a frivolous exercise; each assessment given should have a clear objective and show respect for the test taker's time and willingness to share personal details. Further information on purposeful planning around the EQ-i 2.0 is outlined on the following pages.

Purposeful Planning: EQ-i 2.0 Engagement Process

The flowchart presented in Figure 4.1. shows six recommended steps to engage a client in the EQ-i 2.0 from the initial conversation through to measuring the impact of an emotional intelligence (EI) initiative. Whether you are working with an individual client, a client organization, the EQ-i 2.0 or the EQ 360® 2.0, these six broad steps apply in almost all new relationships you forge that are likely to involve development around emotional intelligence.

Just by glancing over the steps, you will see that using the EQ-i 2.0 is not just about ensuring test takers complete the assessment; there are multiple steps involved before and after the administration to ensure both you and your EI initiative

are set up for success. Like any development initiative, over 50 years of research indicates that development efforts must be accompanied by significant and visible support from key stakeholders in order to see the desired performance translated to the job (Broad, 2005). If the intent of using the EQ-i 2.0 is anything more than personal insight, engaging your client before, during and after administration will be crucial in driving individual and organizational change.

The remainder of this chapter outlines the details of each step in the EQ-i 2.0 Engagement Process along with some best practices when working with both individuals and organizations.

Step 1: Investigating Underlying Needs

When embarking on a relationship that is likely to involve administering the EQ-i 2.0, it is crucial to define your client's (or client organization's) underlying needs. Underlying needs include any challenges that the client is currently experiencing that may be alleviated by introducing a measure of EI. For instance, you may find yourself dealing with a recently out of work manager who is contemplating a career change or a corporation who is looking to strengthen their leadership team's ability to manage change.

A guiding principle espoused by Covey (2004) is that one begin with the end in mind while investigating the underlying needs of your client. Ask yourself and your client: *What is the end goal for the relationship/contract we are about to enter? What underlying needs does the client expect the EQ-i 2.0 will address?* Top consultants answer these questions by researching within an organization, asking the right questions and testing hypotheses even when they believe they themselves are sure of the answer. Identifying upfront the expectations of engaging in an EI initiative provides you with a checkpoint against which you can constantly monitor your client's progress. It also allows you to evaluate the success of the EQ-i 2.0 post-assessment, to ensure all expectations were met.

Identifying underlying needs can take many forms. With a single individual, you may simply meet with them before taking the EQ-i 2.0 to talk about what they are interested in finding out from completing the assessment. Discovering an entire team's, department's, or corporation's underlying needs is usually a much bigger undertaking. Some techniques commonly used to investigate underlying group needs are:

- interviews
- focus groups/world cafes
- multiple meetings with various stakeholders
- observations (observing meetings, presentations, work performance/tasks)
- gathering hard data (e.g., financial performance, customer satisfaction metrics, turnover rates)

Whether your client is one individual or an entire organization, Table 4.1 identifies some questions you might ask yourself while you are uncovering your client's needs.

Having the answers to these questions informs your contracting phase and also allows you to create the best possible value proposition for how the EQ-i 2.0 can meet some of your client's underlying needs.

Figure 4.1. Client Engagement Process: Six Steps to Gaining Buy-In

Table 4.1. Questions for Consultant Reflection

Questions	Gather These Details
1. Who am I to this client?	• Do I have a personal rapport or history with this client? • Am I being seen as a coach/consultant/trainer/psychologist? • How does that impact the client's expectations of me?
2. Why am I here and what am I doing?	• What are the goals of this relationship? • What information/research do I need to validate these goals? • What needs does the client have that the EQ-i 2.0 may address?
3. Who do I work for?	• Who will I contract with? • Do I foresee any conflicts of interest or other ethical concerns?
4. What do I want/expect from the client?	• How much time and effort will the client/client organization need to invest in this process? • Is there an internal champion for this process? What level of participation do I expect?
5. How will I protect confidentiality?	• Can I foresee any issues with regards to confidentiality? • How can I protect the privacy of participants from the onset of this relationship?
6. Who will have access to data?	• Where/how will the EQ-i 2.0 results be used? • How can I make it clear from the beginning that data will be protected?
7. What's in it for the client?	• What benefits will the client/client organization receive from entering into this relationship? • What type of feedback process will I use and how will this information be used to improve themselves/the organization?
8. How much does the client know about EI?	• Is the client well versed in EI? What models or assessments are they familiar with? • How does this impact my approach to talking about the EQ-i 2.0?
9. Can I be trusted as an EI expert?	• How can I establish myself as a trusted EI authority? • What expertise/past experiences do I need to share to build trust in this relationship?

Note. Adapted from Organizational Development and Change, by Cummings and Worley, 2005, 8th Ed.

Step 2: EI Value Proposition

Once underlying needs have been identified, the value for the client is in seeing how EI can be part of the solution for resolving their needs. In many cases, either a personal or organizational need can be distilled to one of the emotional and social skills measured by the EQ-i 2.0. That's why the fifteen subscales are often referred to as building blocks. By showing how a client's need rests on these EI building blocks, you can make clear, theoretical connections between the EQ-i 2.0 and the needs that a client wishes to resolve the most. Some examples are shown in Table 4.2.

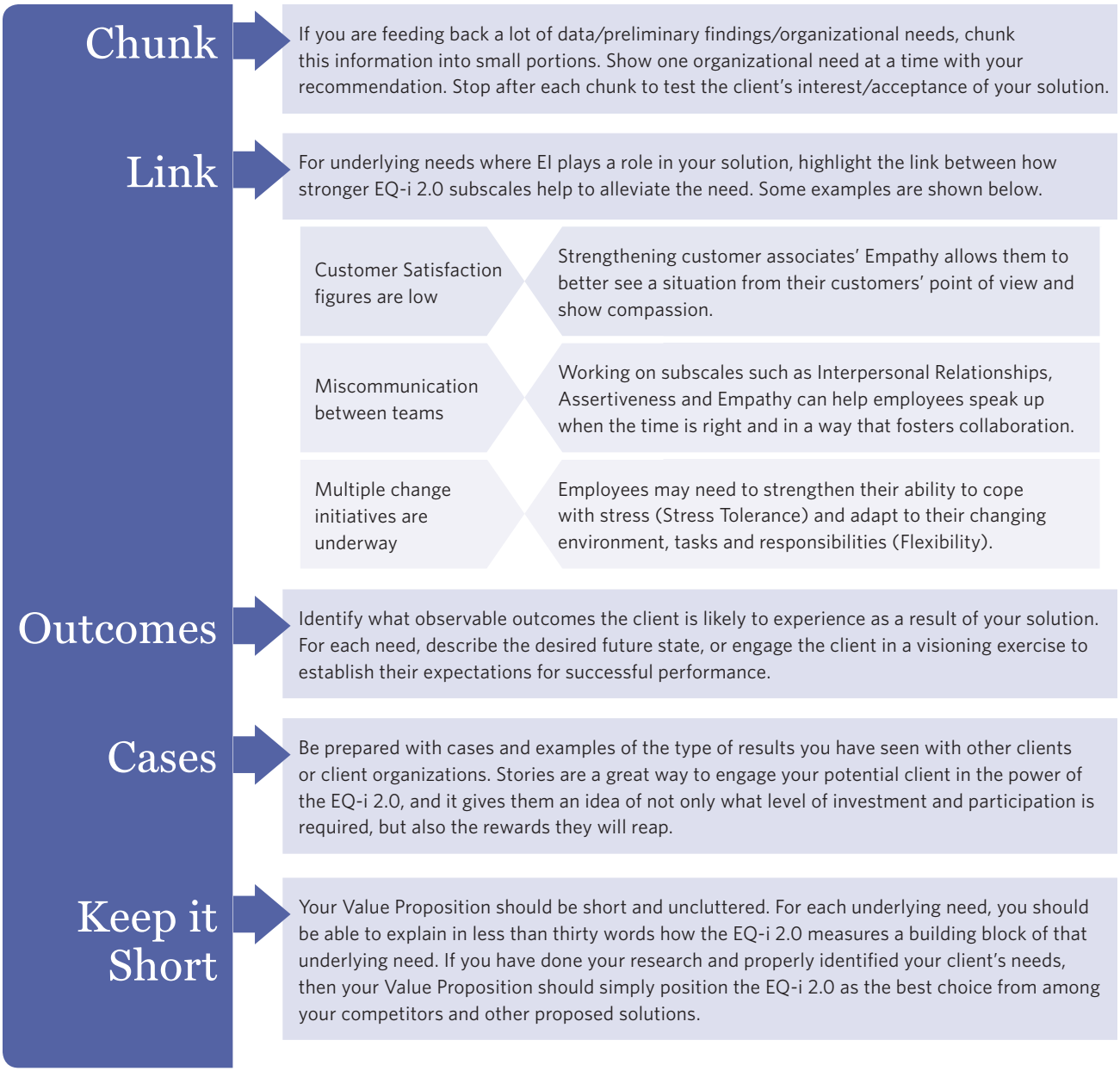
A best practice from coaches and consultants who work with the EQ-i 2.0 in organizations is to create a value proposition which communicates the value in adopting the EQ-i 2.0. It is a conversation or a document that summarizes all the information you uncovered about a client's needs and makes clear links to how the EQ-i 2.0 may be a viable solution in addressing those needs. Keep in mind a value proposition can only be effective if you have correctly identified the client's needs in the first place. If it is possible to do so, validate the needs you have identified against sources within the organization before you take the step of recommending solutions.

Your value proposition should be created using the best practices illustrated in Figure 4.2.

Table 4.2. Communicating the Value of EI

Common Organizational/Department/Team Needs	How the EQ-i 2.0 is Connected
Too many costly and unsuccessful hires	When EI is related to high performance, the EQ-i 2.0 can be integrated into the selection process to make better hires.
Leaders are unequipped to handle change	At the root of managing change and inspiring others through tough times, leaders must first manage their own emotions associated with change (Emotional Self-Awareness, Emotional Expression).
New products are being developed	Although analysis and decision making around new products will typically involve data, it will also require decision makers to let go of their personal attachment, solve problems using both hard and emotional data and resist rash decisions (Reality Testing, Problem Solving and Impulse Control).
Leaders shy away from healthy conflict	Conflict Management skills can be addressed by zeroing in on elements such as Impulse Control, Assertiveness and Self-Regard, so that leaders manage conflict in a way that is healthy and constructive.
I'm looking to make a career transition	Because all jobs require some degree of emotional and social functioning, knowing how EI strengths align to future career possibilities will help inform your client's career transition plan and ensure they work on EI development goals that better position them for the career they want.
I want to build stronger relationships	In both personal and professional spaces, individuals need to understand how well they maintain positive relationships, show care and concern for others and demonstrate oneself as a contributing member of one's social group (Interpersonal Relationships, Empathy and Social Responsibility).
I don't know my strengths or weaknesses	Because the EQ-i 2.0 measures an array of social and emotional skills that underpin a whole host of other competencies, the assessment is a good, non-threatening place to start this conversation and subsequent coaching.
I want to succeed at university	Much research has shown that students who have well developed EI perform better in higher education. Specific areas that may derail your client's university career can be examined and addressed before they become issues.

Figure 4.2. Best Practices in Creating Your Value Proposition



Step 3: Securing Buy-In

Gaining buy-in for EI begins with the very first interaction with a client and is an ongoing process until the contract is complete. However, as a formal step, buy-in is required on your value proposition before you move onto contracting, hence its current position in the EQ-i 2.0 Engagement Process. However, even the best value proposition will likely stir up questions and/or concerns in your audience unless you do some additional work to secure buy-in.

The EQ-i 2.0 is like any other psychological assessment and may at first be met with resistance or skepticism from future participants. To help gain buy-in and support for the assessment and any accompanying activities, proactively counter any concerns or barriers from the start, before you begin contracting or administering the EQ-i 2.0. Some practices for gaining buy-in for the EQ-i 2.0 are outlined here.

Gaining Individual Buy-In

Individual clients may have reservations or concerns about psychological testing in general that may color perceptions of the EQ-i 2.0. It is a psychological test by its very nature, but there are some things that distinguish the EQ-i 2.0 from traditional tests and testing practices. Presented next are points to ease your client's concerns and help gain buy-in for taking the EQ-i 2.0.

1. The EQ-i 2.0 is not a diagnostic test.
   - The EQ-i 2.0 does not diagnose the test taker. It can be used as part of a larger diagnostic process in a clinical setting, but in most cases it is used to provide personal insight into strengths and areas for development. Your client will not be labeled, nor, will any decision be made on the basis of EQ-i 2.0 results alone.
2. There are no right or wrong answers.
   - The items on the EQ-i 2.0 use a Likert scale where you indicate how frequently you behave a certain way. As such, there are no right and wrong answers, nor a pass or fail result.
3. Self-reports have limitations.
   - A psychological self-report test has its limitations and it is responsible behavior for the assessor to admit them openly. Some examples of limitations are that test takers can lie or skew their responses, or that a test taker may not be self-aware enough to answer accurately about their own behavior. The basic premise, however, stands that the quality of the results always reflects the quality of responses. In most cases, if your client answers the EQ-i 2.0 openly and honestly, the results represent an accurate reflection of the individual.
4. You, the test taker, own the results.
   - The test taker owns the results of their EQ-i 2.0. They have the right to keep their report and decide who they will share their results with, if anyone. Reassure your client of your protection procedures for his/her confidentiality. Detail where results and reports are saved and ensure your client understands how he/she can access his/her results in the future.
5. There are very few age, gender or ethnic differences in EQ-i 2.0 scores.
   - The EQ-i 2.0 does not discriminate against age, gender or ethnic groups. There are small group differences at the subscale level, but on a whole most people will encounter the same experience when taking the assessment. You may want to describe the make-up of the norm group against which your client's score will be compared to ease concerns about being unrepresented in the norm group. See chapter 13 for more information.
6. Emotional Intelligence is comprised of "dynamic" skills.
   - The EQ-i 2.0 measures emotional and social functioning which are made up of dynamic skills that can be brought into play in any job, relationship or interaction. Being dynamic means these skills can be improved through training and coaching and are not fixed like personality traits or IQ. Your client should not feel boxed in or defined by their results on the EQ-i 2.0; unlike personality, the client can grow and develop in any EI skill area he/she chooses.

Gaining Organizational/Stakeholder Buy-In

Any of the concerns raised above at the individual level may also apply when you are engaging a group, department or entire organization in an EI initiative. You may find it helpful to include some common misperceptions or Frequently Asked Questions (FAQ) in your presentations on EI to preclude any barriers to buy-in. If you are working with EI in organizations, universities or other large group settings, you may find you need to do more than just overcome personal fears and hesitations around testing; you may also need to address questions like:

- How much will this cost us?
- What is our return on investment (ROI) for using the EQ-i 2.0?
- How much time or how many resources will this take?
- Will it have a lasting impact?
- How will it impact performance, engagement, satisfaction, leadership, or the bottom line?
- How will EI be integrated into other parts of the business?

Evidence-Based Practice

To help support your EI initiative, it can be effective to present information that demonstrates the impact to the bottom line for your potential client. This section outlines several cases that you may find relevant to your objective and wish to leverage to gain support and buy-in for your EI initiative. For more information on these cases, refer to the resource center at http://ei.mhs.com.

Leadership

Sample of 220 North American Leaders – MHS (2011)

Leaders score consistently higher on the EQ-i 2.0 than the general population. Additionally, there are links between certain EQ-i 2.0 subscales such as Assertiveness, Independence, Self-Actualization, Empathy and Optimism, and transformational leadership qualities. By linking EI to any leadership model or framework, one can distill down a majority of leadership competencies (whether transformational or transactional) into the specific emotional or social skills that need to be developed in order to see gains at the broader competency level.

The AMEX Challenge

American Express – Durek (2005)

MHS conducted a study for American Express in Fort Lauderdale to determine the EI skill set that best predicted success for customer-focused Sales Associates. Two metrics that defined success in this role were customer satisfaction (feedback regarding customer service based on 13 behaviors) and sales goal attainment (profitability of associates' work). MHS quickly realized that while some associates had high customer service skills and some had high sales group skills, few were strong in both performance criteria.

Associates who scored high in both performance categories scored significantly higher on the EQ-i as compared to those who only scored well in one performance area, or were low in both. In other words, high emotional intelligence was a strong predictor of associates with both required skill sets. Those who excelled in sales as well as meeting customer needs clearly outperformed those who did not. In fact, emotional and social skills make up one-half of the skill set that current successful telephone service centre reps need to be successful in their new role.

Sales Performance

Pharmaceutical Sales Company – MHS (2010)

A North American Pharmaceutical Sales company integrated the EQ-i 2.0 into their sales representatives' performance appraisals and found that the top third of their sales representatives (as rated by managers) had significantly higher scores on scales such as Impulse Control, Decision Making and Stress Management than the sales reps in the bottom third performance group.

Selection and Retention Case

U.S. Air Force – Handley (1998)

U.S. Air Force recruiters were suffering from high rates of first-year turnover. In their efforts to increase recruiter retention, the USAF used the EQ-i assessment to study the differences between successful and unsuccessful recruiters. Notable score differences between the two groups were evident in areas such as: assertiveness, self-actualization, stress tolerance, flexibility, problem solving, and happiness.

Using their findings from the EQ-i, the USAF developed a pre-employment screening system which led to a 92% increase in recruiter retention with a savings of $3 million annually.

Step 4: Clarifying Deliverables/Contracting

The phrase "get it in writing" reminds us of the value of a written agreement because an agreement outlines the working parameters and expected conditions in a given relationship. Engaging a client in the EQ-i 2.0 process requires much of the same up-front contracting and in fact, when done properly, can actually help you avoid many of the confidentiality issues (e.g., who owns the data?) or common misuses of the EQ-i 2.0 that tend to surface later in the administration process.

By incorporating the following elements in your contract you can avoid unmet expectations around the purpose of your partnership with a client (Block, 2000). These elements have been adapted to suit a typical organizational level EQ-i 2.0 consulting initiative, although the elements are still applicable to contracts/binding conversations with a single client.

1. Boundary Analysis
2. Project Objectives
3. The Kind of Information You Seek
4. Your Role
5. The Product You Will Deliver
6. Support and Involvement Required
7. Time Schedule
8. Confidentiality

Each of the eight contracting elements have been outlined further in Table 4.3. Notice how much of the information gathered through EQ-i 2.0 Engagement Process overlaps with each of the eight contracting elements.

Table 4.3. Contracting Elements

Contract Element Description	Refer To Information Collected In The Client Engagement Process	Example
1. Boundaries of Analysis		
Begin with a statement outlining the organizational "need" that your work will be focusing on. If you know what will not be involved in your initiative then include it here.	STEP 1. Investigate Underlying Needs	"The EQ-i 2.0 will be administered to all high potential managers enrolled in Leadership 101. A full day of training content will be devoted to learning EI competencies and managers will receive a one hour debrief of their results with an external coach. The EQ-i 2.0 acts as an integral and ongoing assessment that HR wished to offer high potentials for their personal growth and development."
2. Objectives of Project		
Outline the benefits that the EI initiative is expected to produce for the client.	STEP 2. Communicating Value of the EQ-i 2.0	"The main objective is to provide all high potentials with: • A common language • Insight into their emotional and social functioning • Data to drive their personal goal setting throughout their training program." "A second objective is to pilot the EQ-i 2.0 within the organization. Feedback and post-assessment follow-up will be collected to determine whether the EQ-i 2.0 can be used with other teams in the company."
3. Type of Information You Seek		
List the kind of information you will need to ensure the success of the EI initiative. This listing can include people you will need access to, data, models and processes (e.g., competency models or objective performance data) or additional client resources (e.g., training curriculum/ providers if you are imbedding EI into an existing training program).	STEP 1. Investigate Underlying Needs	"To complete the project I need access to all 12 high potentials, the training manager and the HR manager. I will also need to work with the existing training materials and content in order to build one day of EI content. I will also need access to all participants and their managers for 1 hour each following the program to evaluate success."
4. Your Role		
State your role in the EI initiative (e.g., coach, training facilitator) and how you wish to work with the client. Much of this information will come from your initial conversations and by asking yourself: "Who am I to this client?"	STEP 1. Investigate Underlying Needs	"My role is to manage the project from my consulting practice perspective. I will oversee the project and work closely with the internal project champion (HR Manager X). The actual delivery of the EI training program and coaching hours will be completed by my training facilitator Mr. Smith."
5. The Product You Will Deliver		
At this point you want to be very detailed, using tangible terms about the product you will be delivering. Remember to new users, the EQ-i 2.0 can seem nebulous. Clients may ask you: • Who receives a report? • Do I get data? • Can I see the team's results? • Is there coaching? • Will there be recommendations for leadership development from taking the EQ-i 2.0?	STEP 2. Communicating Value of the EQ-i 2.0	"The products include: • An individualized Workplace report for every high potential who completes the EQ-i 2.0. • There will be NO group report, or group analysis presented to senior management. • A customized EI one day training program will be delivered • 3 coaching hours spread over 3 months with an experienced EI coach. • One report and presentation to present the evaluation of the EI training program and recommendations for next steps in using EI within your organization."
6. Support and Involvement Required		
List what you need from the client in order for your EI initiative to be a success. If you know what will not be involved in your initiative then include it here. You can be explicit here about your expectations in terms of participation in the EQ-i 2.0, internal support and championing of the project, resources and even access to key decision makers when the time is appropriate. Reflect on any barriers or challenges you had from the client in the initial conversations as you can likely reverse these and turn them back as requests to client (e.g., time or organizational resources).	STEP 1. Investigate Underlying Needs and STEP 2. Communicating Value of the EQ-i 2.0 and STEP 3. Gaining Buy-In	"I will need all 12 high potentials to complete the EQ-i 2.0, which takes about 30 minutes. Managers will need to allow for this. I need internal support to allow the high potentials to not only attend the EI training but to practice the concepts back on the job... The time commitment expected of participants is X over a 3 month period."

Table 4.3. Contracting Elements *(Continued)*

Contract Element Description	Refer To Information Collected In The Client Engagement Process	Example
7. Time Schedule		
Outline major administration milestones in the EQ-i 2.0 process: • Invite to take assessment • Complete rater list (EQ 360 2.0 only) • Deadline to take assessment • Reporting • Result debrief/feedback • Presentation of group results (if applicable) • Coaching/action planning sessions	STEP 1. Communicating Value of the EQ-i 2.0 and STEP 2. Gaining Buy-In	"The proposed schedule: • April 1- Invite to take EQ-i 2.0 • April 7- Send out reminder • April 20- Deadline to complete assessment • April 21- May 10- Build EI training curriculum • May 10- Internal sign off on curriculum • May 25- Deliver debriefs and reports"
8. Confidentiality		
Acknowledge any confidentiality concerns and prevent them from snowballing later in the process. • How will test results be shared? • How will people's right to confidentiality be protected in a group setting? • Where is test data stored? What happens if a report is lost? • Will the client know who did/did not complete the EQ-i 2.0? • How will raters' anonymity be protected for the EQ 360 2.0?	STEP 1. Investigate Underlying Needs and STEP 2. Communicating Value of the EQ-i 2.0 and STEP 3. Gaining Buy-In	"Understanding that EQ-i 2.0 results and reports are owned by the participants alone, there will be no expectations for the participants to share their results. Each participant will receive their report and data will be housed in the secure database of the test provider (MHS). There needs to be strong internal championing of this process, but it is not mandatory for participants to complete the EQ-i 2.0."

Step 5: Administration

Please see chapter 5 for details on the administration process for the EQ-i 2.0.

Step 6: Follow-up and Evaluation

Evaluating your EI initiative is crucial to sustaining individual, team and organizational commitment to long term EI growth. Like any development program, you need to follow-up with participants and key stakeholders to assess whether the EQ-i 2.0 was successful in achieving its intended goals. As mentioned earlier in Steps 1 through 4, having clearly defined the outcomes expected from using the EQ-i 2.0 will now allow you to measure the impact of your initiative on either individual or group level performance.

Individual Follow-up and Evaluation

In an ongoing coaching relationship, re-administering the EQ-i 2.0 after development efforts have been made is a standard method of measuring specific, quantifiable growth in your client's EI skills. For example, if you are working with your client on developing her empathy, retesting after 3 months of practicing and honing various empathy skills should reflect an increase in your client's empathy results on the second administration.

The recommended time lapse between administrations of the EQ-i 2.0 is 2 months.

Follow-up can also take a more informal approach by placing checkpoints along your client's development path. Particularly if you are using an action plan and/or development commitment (like those presented in the Workplace Report), you can assign specific dates to check in on your client's progress in achieving his or her personal goals. If goals were initially created to be measurable and time-bound, then determining whether your coaching has been instrumental in reaching these goals should be relatively simple at this point. The following questions will help to inform your evaluation:

- How well do you feel you are tracking against your EI development goals?
- Which goals do you believe you have achieved? How do you know?
- What indicators (e.g., job performance, decreased stress) suggest that your goal has been reached? Have you experienced any unexpected benefits?
- Can you seek feedback from your manager, colleagues, friends or family to verify your improvements in a particular skill?
- Now that you have reached this goal, what will be your plan for maintaining this higher level of performance?

- How do you think this coaching relationship is going? What would you like us to keep doing, stop doing or start doing in order for it to be more effective?

Large Scale Follow-up

For initiatives where the EQ-i 2.0 has expected organization, department or team level outcomes, ongoing follow-up is particularly important to determine whether adjustments to the initiative need to be made and whether in the end, the initiative delivered the expected returns.

Circle back to the Project Objectives you outlined in the Contracting Phase to determine which outcomes need evaluation. If the EQ-i 2.0 was administered as part of a larger leadership training program and the objective is to produce stronger leaders, how will you evaluate whether "stronger leaders" are the end result? Or was your EI intervention expected to produce economic returns (e.g., reducing attrition rates and hiring expenses for a high risk position)? In either case, these outcomes are unlikely to be measured by re-administering the EQ-i 2.0. Instead, you will need to use metrics available within the organization to measure whether improvements have been made. For example, consider whether you can make theoretical links between the EQ-i 2.0 subscales and the competencies that define stronger leaders in your client organization. You would expect to see improvement in performance review data on those competencies that are linked to EI development (e.g., strengthening Assertiveness, Empathy and Impulse Control should in turn strengthen leaders' conflict resolution skills).

If a post measure of the EQ-i 2.0 is desired, follow the same guidelines for re-testing individuals and aggregate results to measure EI growth at a group level.

CHAPTER 5

EQ-i 2.0 Setup and Scoring

In this chapter, you will find information on using your EQ-i® 2.0 Portal account, preparing respondents for taking the EQ-i 2.0, and selecting the EQ-i 2.0 report options that are right for you. The EQ-i 2.0 Portal site is constantly evolving, so to ensure you have the most up-to-date information, the major administrative steps are outlined here, while finer details of setup and scoring are available in your EQ-i 2.0 Online Help. The guidelines presented in this chapter bring together psychological testing standards jointly developed by the American Psychological Association, the American Educational Association and the National Council on Measurement in Education (APA, 1999) with best practices in organizational development, performance coaching, leadership development and training design. The intention is to provide an ethical yet impactful process for using the EQ-i 2.0 in a way that facilitates behavioural change.

Your EQ-i 2.0 Portal Account

Your EQ-i 2.0 Portal account is password-protected and is intended for qualified assessment administrators only. To protect your clients' privacy, do not share your login ID with unqualified associates or EQ-i 2.0 participants.

Administration of the EQ-i 2.0 is managed online via a web application. Upon qualifying to use the EQ-i 2.0, you are e-mailed a login ID and password to access a private EQ-i 2.0 Portal account at http://ei.mhs.com. You invite participants to take the EQ-i 2.0 through your Portal account, and you will receive an e-mail notification when a test has been completed. Then, you can instantly score the administration and generate the required reports.

Your Portal account also includes access to a private online network of emotional intelligence specialists and an electronic library of articles, papers, presentations, and other job aids, bringing you helpful ideas and winning best practices to improve your clients' EQ-i 2.0 experience.

As part of your account, you have access to four main resources:

- Assessments
- Community
- Certification
- Resource Center

Each of these resources is outlined next.

The Assessments Tab

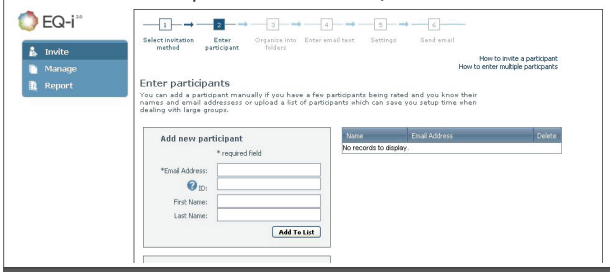
The Assessments tab of your EQ-i 2.0 Portal account provides administrative access to the EQ-i 2.0, the EQ 360® 2.0 and, as they become available, assessments currently in development. After logging in to your account, you can set up new assessments, invite respondents, and generate reports.

To start using the EQ-i 2.0 or EQ 360 2.0, log in to your EQ-i 2.0 Portal account and click the Assessments tab. Select the EQ-i 2.0 or EQ 360 2.0 and follow the instructions on your screen. Figure 5.1 shows the three options you will see: Invite (to invite respondents), Manage (to manage their records), and Report (to select and create reports).

Figure 5.1. Using the EQ-i 2.0

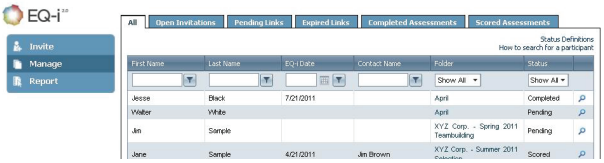
Invite

E-mail participants directly from your EQ-i 2.0 Portal account. Your client receives a unique link to take the EQ-i 2.0 online.



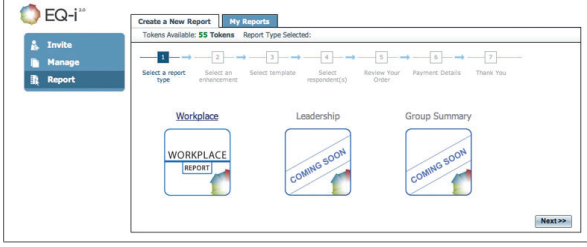
Manage

Your account dashboard shows you who has completed the EQ-i 2.0 so you can track your projects and quickly access reports.



Report

Pay for customizable reports using tokens. You can purchase tokens in advance and spend them on any EQ-i 2.0 report, or pay as you go.



If you prefer to administer an EQ 360 2.0 assessment, simply log in to your EQ-i 2.0 Portal account and click the Assessments tab. Select the EQ 360 2.0 and follow the instructions on your screen. Figure 5.2 presents the four options: Add a Participant (to invite a ratee), Nominate Raters (to invite a rater), Track Completion (monitor who has completed the assessment and when), and Create a Report (to select and create reports).

The Community Tab

The Community tab of your EQ-i 2.0 Portal account provides you access to a private network of EQ-i 2.0 practitioners when you are logged in.

The EQ-i 2.0 Portal Community is a global network dedicated to advancing the practice of emotional intelligence assessment and coaching. Members provide strategic insight, world-class research, global thought leadership, and unique educational opportunities integrated across a new Web 2.0 collaboration platform.

As a member of the EQ-i 2.0 Portal Community, you can:

- Gain exposure for your consulting practice and meet potential clients
- Meet the developers of the EQ-i 2.0 and EQ 360 2.0 and table new ideas
- Connect with special interest groups devoted to topics like Leadership, Teambuilding, Psychometrics, and Employee Selection
- Get expert advice on your coaching challenges

To join the network, log in to your EQ-i 2.0 Portal account and click the Community tab. There you can create a profile using your name and any other information you'd like to present, such as your areas of specialization, work history, and when you qualified to use the EQ-i 2.0.

Once you have a profile, you can post comments, join special interest groups, connect with others, and view their information.

The Certification Tab

The Certification tab of your EQ-i 2.0 Portal account provides connections to trainers and workshop calendar.

Certification is the first step for many in becoming a qualified EQ-i 2.0 user. If you are qualified to use B-level assessments but have not received accreditation in the EQ-i 2.0, consider attending a certification workshop.

EQ-i 2.0 and EQ 360 2.0 certification takes just a few days and can be accomplished almost anywhere in the world, thanks to a network of accredited training partners. You can choose to attend the workshop in person or through a blended program that includes an online e-learning component.

Visit ei.mhs.com/Certification.aspx for program learning outcomes, schedules, and links to training registration. Details on certification are also available in chapter 1 of this handbook.

The Resource Center Tab

The Resource Center tab of your EQ-i 2.0 Portal account provides access to an electronic library of materials related to the EQ-i 2.0 and EQ 360 2.0. You must be logged in to your account to search the entire database.

MHS has catalogued a collection of multi-media resources to help you use the EQ-i 2.0 and complementary products. You can find articles, papers, webinars, slide decks, and other job aids on topics such as:

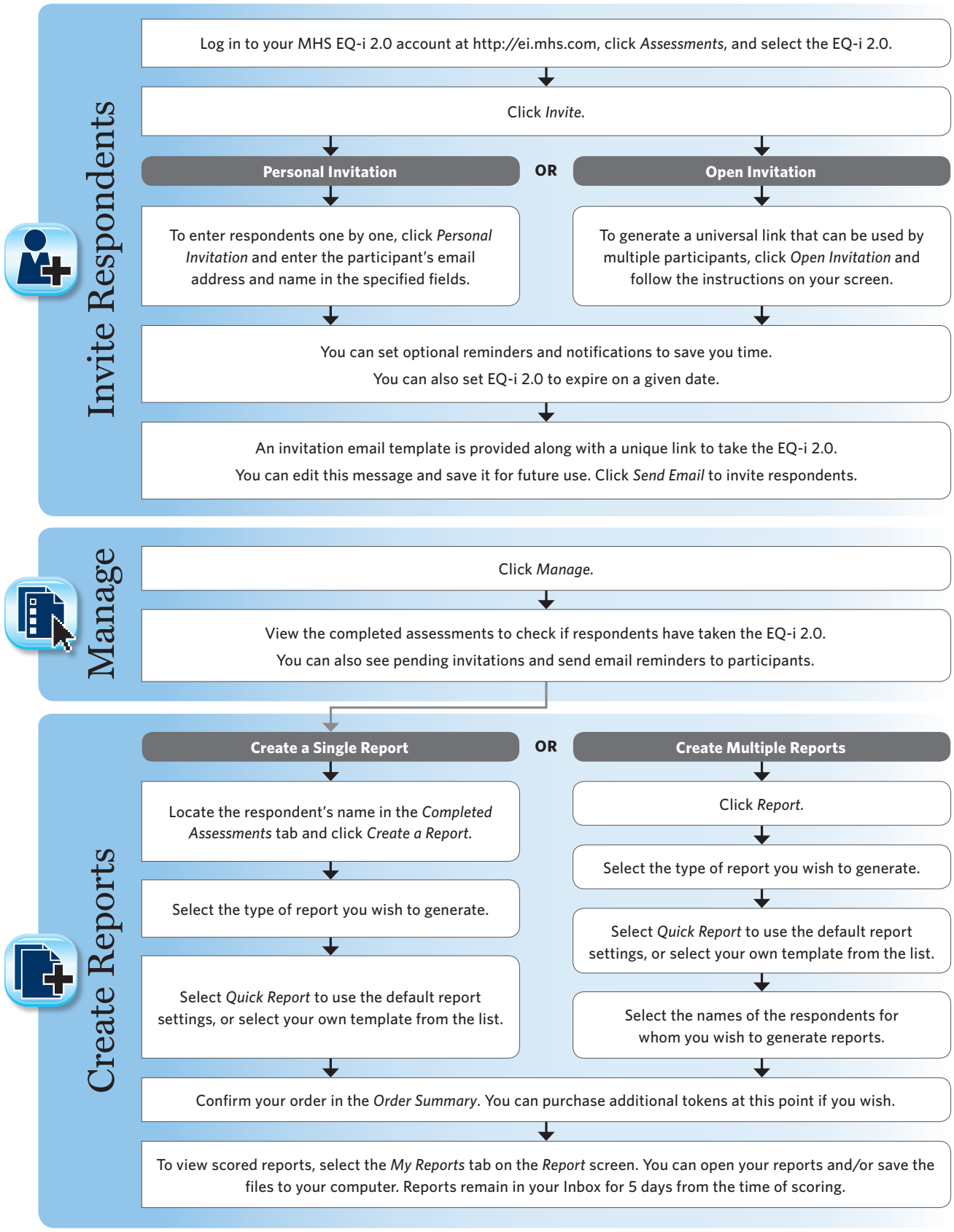
- Gaining organizational buy-in
- Mapping the EQ-i 2.0 factors onto existing organizational competencies
- Introducing the EQ-i 2.0 to participants
- Understanding the differences between the EQ-i and the EQ-i 2.0
- Interpreting results
- Coaching strategies
- Using the EQ-i 2.0 for selection
- Peer-reviewed research

Resources are available free of charge for EQ-i 2.0 users, and many can be reprinted or adapted for use with your clients. To search the library, log in to your EQ-i 2.0 Portal account and click the Resource Center tab.

Administration Procedure

Online administration is by far the most widely used method of administration, so we have used it to depict the recommended administration and scoring procedure (Figure 5.2).

Figure 5.2. EQ-i 2.0 Online Administration Procedure



Administration Guidelines

EQ-i 2.0 administrators should:

- Explain to the respondent why he or she is being asked to complete the EQ-i 2.0.
- Inform the respondent that the purpose of the assessment is to obtain a picture of his or her level of emotional and social functioning. Use general language (e.g., do not use scale or subscale names) to avoid biasing the respondent's ratings.
- Ensure that informed consent has been obtained from the respondent. As part of this process, explain confidentiality (see Informed Consent and How to Obtain It in this chapter).
- Provide a quiet environment with minimal distractions. If the respondent is completing the EQ-i 2.0 remotely, encourage him/her to choose a place and time that allow privacy and quiet.
- If administering the online version locally (e.g., on your own laptop or in a common area such as a spare office), provide the respondent with a computer that has internet access. If administering the online version remotely (i.e., on the respondent's own computer), ensure that the respondent has internet access and a valid e-mail address.
- Tell the respondent that there are no right or wrong answers and that the responses should represent his or her own opinions. Ask the respondent to choose only one response for each item.
- Tell the respondent to answer openly and honestly and respond to each item as it best applies to him or her at that time. It is important not to overthink or guess at what a given item is trying to measure.
- Ensure that 60 minutes of uninterrupted time is available to complete the assessment in one sitting. Respondents typically take between 20 and 30 minutes to complete the assessment, but providing a 60-minute window ensures the respondent is not put under any time pressure.

AVOIDING BIAS

Before and during administration, the administrator must try to avoid anything that may bias the responses. If, for example, the EQ-i 2.0 is being used as a screener for making a hiring decision, the desired EQ-i 2.0 results, profile, or cutoff points should not be revealed to the respondents until after the respondent has finished. Respondents should answer on their own, without direct or indirect influence from others. Questions asked by respondents during the administration session can be answered in a non-leading manner, but it is best to try to defer questions until after all of the items have been answered, because it is often difficult to recognize when a comment may be leading. In the context of a group administration, the danger of providing a direct answer is that such a question-and-answer exchange may get magnified across participants.

Preparing Participants

Speaking with respondents before the administration is essential to completing a successful EQ-i 2.0 assessment. All individuals participating in the EQ-i 2.0 assessment process need to have an understanding of the purpose, process, and expectations of the assessment. The more individuals understand about why an EQ-i 2.0 assessment is being introduced and how the information will be used, the more likely participants will be to engage in taking the assessment openly and honestly.

This section discusses best practices for meeting with respondents one-on-one or as a group prior to administering the EQ-i 2.0.

Hosting a Pre-Assessment Interview

When assessment is not part of an organization's culture, or when a coach is working to build an ongoing relationship with a client, a private interview can be particularly beneficial in setting the stage for the EQ-i 2.0 process. Consider the following topics for discussion.

1. Discuss with your client the expected outcomes of the assessment – what do they want to get out of it?
2. Discuss the reason why your client was selected to participate.
3. Identify a number of EI competencies that are particularly important for success in your client's position or current life circumstances.
4. Discuss with the participant informed consent and their right to confidentiality. Explain where the data will be kept, and who will have access to the data.
5. Discuss the importance of providing answers that are honest and reflect current functioning.
6. Discuss with the participant how he or she will receive ongoing support and follow-up. Participants need clarification about what is expected of them after they receive their feedback.

The general approach to introducing the EQ-i 2.0 is to stress the positive, constructive, and beneficial aspects of the assessment. Encourage questions and attempt to answer them in a manner that will not bias their subsequent ratings.

The above topics can be discussed in a group setting if time does not permit individual interviews. Please refer to Step 3: *Gaining Buy-In* in *Planning the EQ-i 2.0 Assessment Process* for additional group orientation guidelines..

Should I reveal the EQ-i 2.0 model prior to administration?

Depending on the knowledge and experience level of the participants, the administrator may want to gain buy-in by discussing the construct of emotional intelligence, what participants think about emotional and social skills, and what job competencies are relevant to job performance.

However, too much emphasis on the EQ-i 2.0 model, definitions of the scales, and the contents of the report can influence respondents' results.

Informed Consent and How to Obtain It

The following section outlines the process for obtaining informed consent. It is not the intention of this section to be all-encompassing or the final authority. It is recommended that any users of the EQ-i 2.0 or EQ 360 2.0 become familiar with the guidelines outlined by their respective national and/or regional governing body (e.g., American Psychological Association, Society for Industrial Organizational Psychologists, etc.).

The process of obtaining informed consent begins by explaining to the respondent the general purpose of the assessment, including the reason he or she is being asked to complete the EQ-i 2.0. In most settings, the respondent must be informed of any limits to confidentiality and what the administrator will do to ensure confidential information is protected.

The respondent must be instructed that he or she has the right to stop the assessment at any time for any reason (consistent with the ethical standard of "freedom to withdraw"), and made aware of the consequences of this choice and of any alternative options. Informed consent means that the respondent has agreed to complete the assessment without being forced to do so, and understands what the task involves (i.e., answering questions about one's feelings and behaviors) and how the results will be used.

Confidentiality is often addressed as part of the informed consent discussion and should include information about protecting the privacy of respondents' responses. The assessor/administrator must be honest about who will have access to the results of the assessment(s), and the purpose or goal for which the results will be used. The respondent should be informed about the measures that will be taken to keep the information confidential (e.g., printed reports will be stored in a locked file cabinet in a locked office). Assessors using the online administration option should visit www.mhs.com to access the MHS Security Policy, which includes information about the advanced security methods used by the EQ-i 2.0 Portal for the protection of sensitive and confidential data.

The respondent should be reminded why he or she was asked to complete the EQ-i 2.0, and when results and recommendations will be provided. The assessor should answer any questions and/or address any concerns that the respondent may have about the administration of the assessment.

Figure 5.3 provides a sample Informed Consent form, which can be used as a record.

Figure 5.3. Sample Information and Consent Form

Emotional Quotient Inventory 2.0
Information and Consent Form

As part of the ABC Corporation's candidate selection process, we request that you experience the process of assessing your own emotional intelligence by completing the EQ-i 2.0 inventory and receiving feedback from a qualified professional who will contact you to arrange a follow-up interview.

Confidentiality

Your results (test protocol and reports) are viewed only by those responsible for their preparation and for delivery of feedback to you, and those responsible for candidate selection. All information is regarded as confidential. Following your feedback session, all copies of your reports are destroyed. Your results are maintained in Multi-Health System's database, strictly on an anonymous basis, for use in any future research that would involve the EQ-i 2.0.

All information shared with your feedback professional is confidential and subject to rules regarding privileged communication between a qualified professional and a client. If any aspect of your results is discussed with others who are not directly involved in the provision of feedback, such as for consultations or teaching purposes, no identifying information is disclosed.

Exceptions to Confidentiality

There are five situations in which reporting is compulsory by law:

1. Suspicious of child abuse,
2. Indication of intent to commit suicide or physically harm others,
3. Indication of previous or present sexual abuse by any other Regulated Health Professional,
4. Subpoena by the court, and
5. Fraudulent use of government-issued identification.

By signing below, you indicate your understanding and acceptance of the above information and you agree to permit **GEORGE SMITH** to view the results generated from your responses to the EQ-i 2.0.

Name (Please print):_____

Signature:_____

Date:_____

Witness (Please print):_____

Signature:_____

Date:_____

Inviting Participants to Take the EQ-i 2.0 Online

You can invite respondents to take the EQ-i 2.0 directly from your MHS account. The invitation can be created through two different methods: 1) The Personal Invitation, which emails individual participants a unique link to complete the assessment online; or 2) The Open Invitation, which generates a universal link that can be distributed to multiple participants.

Which invitation method should I use?

The Personal Invitation is the best choice if you have a small number of participants being rated and you know their names and email addresses.

The Open Invitation is the best choice if you have a large group of participants, do not have the participants' email addresses, or if you do not want to send personalized invitations.

Using the Personal Invitation

The Personal Invitation allows you to email participants a unique link to take the EQ-i 2.0. To do this, you enter email addresses (either a few at a time or by uploading them as a list), add some identifying information, then customize an email in which participants will see a link to take the EQ-i 2.0 online.

If your respondent does not have an email address, you can either:

1. Enter the respondent's name but send the link to your own address. You can then open it in a web browser on a computer that the respondent can use to take the EQ-i 2.0.

2. Use the Open Invitation method described below.

Inviting large groups?

If you have a list of participants to invite, you can upload their names and email addresses from a spreadsheet. Click the Download Template link on the Enter participant page and follow the on-screen instructions.

By default, email invitations are sent to participants from "NoReply@mhs.com". However, some firewalls and email management programs may restrict emails sent in batches from unrecognized domains. If your client does not receive the invitation email, you can resend the link to yourself, or ask the respondent to request his or her network administrator to allow email from http://ei.mhs.com. Also, it is important to double check the email address for your client as you will not receive "bouncebacks" or undeliverable messages when an invitation cannot be received by the email address entered. A good practice is to contact your client to confirm that they have received the link and are ready to complete the assessment.

As an alternative, the EQ-i 2.0 portal now allows you to send the invitation email from your own email address. You can access this new feature in two ways: 1) Click *Use different email address* on the Settings page of the Personal Invitation process; or 2) Select *Assessments > Account Settings > Email Settings* from the Assessments tab.

Using the EQ-i 2.0 Invitation Template

When invited to take the EQ-i 2.0 online, participants will receive a standard e-mail from the "NoReply@mhs.com" that includes a link to take the EQ-i 2.0. This link is pre-programmed with the respondents' identifying information (e.g., name, e-mail address) as you entered it into the system, so they do not have to type it when they begin the assessment. Figure 5.4 shows the standard e-mail invitation that participants receive.

Figure 5.4. The Default EQ-i 2.0 Invitation

Dear **{Name}**,

Emotional Intelligence (EI) refers to a distinct combination of emotional and social skills and competencies that influence our overall capability to cope effectively with the demands and pressures of work and life. In preparation for our time together, I would like you to complete an online emotional intelligence assessment instrument, the Emotional Quotient Inventory (EQ-i 2.0). Incorporating more than 20 years' research and development, the EQ-i 2.0 is a psychometrically sound, validated assessment instrument that is applied to EI assessment and development at individual, team, and organizational levels. The EQ-i 2.0 is one of the most respected and recognized EI assessment instruments worldwide and it will provide us with a robust and intuitive framework to address questions related to leadership.

Your assessment answers and results will be held in the strictest confidence. Your report will be made available to you, and I am the only person who will see your results or be able to access them. Following your assessment, you will be invited to book a one-on-one feedback and coaching conversation with me about your results. These conversations will be scheduled for one hour and, just like your results, these conversations will be completely confidential.

In order for the results to reflect your behaviors and feelings as accurately as possible and for you to get the most out of this assessment process and course, please take approximately 20 minutes of uninterrupted time to complete the instrument by **{Date}**. As we will discuss, EI involves the most effective engagement of a combination of skills and competencies that best match the context of your unique situations. Therefore, there are no right or wrong answers.

In order to access the EQ-i 2.0, click **{Here}**. You must complete the questions in one sitting or the system will not save your answers and you will need to start over from the beginning.

I look forward to meeting with you and, in the meantime, please do not hesitate to contact me if you have any questions about the EQ-i 2.0.

Sincerely,

{Administrator Name}

Your name, as entered into your account settings, will appear at the bottom of the e-mail. You can make changes to this invitation provided that you do not alter the link. The next section describes the process for creating your own e-mail invitation template for later reuse.

Creating Your Own Participant Invitation

You can create your own invitation to take the EQ-i 2.0 and save it as a template for later use. Your invitation should include the following information:

- The purpose of the assessment and why emotional intelligence is being measured
- That responses should be completed in one sitting, which should take about 20 minutes
- That responses are in multiple-choice format
- The deadline for completion
- The importance of honest responses
- That they are free to withdraw at any time
- Who will have access to the results and how the scores will be used
- A contact name and number should raters have questions

The e-mail link appears as a variable in brackets. Do not alter this variable or respondents will not receive a link to take the EQ-i 2.0. For complete instructions on saving your template, please see the Help topic Tips on Inviting on your screen.

Using the Open Invitation

The Open Invitation is a new feature of the EQ-i 2.0 portal. Unlike the Personal Invitation, you do not need to enter the email addresses of the participants. Instead, the Open Invitation generates a universal link that can be distributed to multiple participants in the following ways:

- You can copy the link and paste it into an email sent to your contact person or the participants taking the EQ-i 2.0.
- If you wish to include instructions with the link, the Open Invitation provides you with suggested text to use. Copy and paste the text into an email and send it to the EQ-i 2.0 participants. This text contains a clickable link which allows the participants to complete the EQ-i 2.0 assessment online.
- If you do not know the email addresses of the participants, the link can be posted online at a site that participants have access to.
- Alternatively, the link can be printed out and manually distributed to participants.

Completing the Assessment Online

Whichever invitation process you use, participants will receive a link to complete the EQ-i 2.0. Upon clicking the link, respondents are taken to the EQ-i 2.0 assessment in their Web browser. There, respondents:

1. Read and accept the Terms and Conditions of use.
2. Enter/verify demographic information, including first and/or last name or ID, age, and gender.
   - » The name fields are pre-populated if you entered names when you set up the EQ-i 2.0 invitation. It is not mandatory for participants to enter their full names. Instead they may wish to enter only a first name, a last name, or a user ID to remain anonymous.
   - » Age and gender are optional for General Population scoring but are required if you wish to score the respondent against only those members of the normative group who share the respondent's gender and belong in the same age range.
   - » You can modify demographic information after the EQ-i 2.0 is complete (before it is scored).
3. Read Welcome screen instructions for completing the EQ-i 2.0.
4. Complete the 133 items of the EQ-i 2.0.

Once the assessment is complete, the administrator receives a notification via e-mail. You can enter in an additional contact name during the Invite process if you would like a third party (such as the respondent's manager) to receive an e-mail notification when the assessment is complete.

Generating Reports

Reports are generated using a token system. You purchase tokens from MHS which are then redeemed for any report you choose. You can purchase tokens ahead of time, or pay for transactions as you go using a credit card.

To score and generate a report, log in to your EQ-i 2.0 Portal account, select the EQ-i 2.0 from the Assessment page, and click Report. There, you will have the option of selecting a report type.

If you are scoring only one report at a time, you can generate the report from the respondent's EQ-i 2.0 record on the Manage screen.

The Workplace Report

The Workplace Report is designed for use in a wide variety of coaching and development situations and work settings. It focuses on the impact of emotional intelligence at work and offers suggestions for working with colleagues, supervisors, and clients. In recruiting, this report is useful when using scores to guide the selection of follow-up interview questions, and in identifying potential training and development needs.

When you generate a Workplace Report, you will receive two PDFs (Client and Coach sections; see Table 5.1). The administrator retains the Coach section for interpretation.

Other Reports in Development

At the time of publication of this *User's Handbook*, other EQ-i 2.0 reports are in development, including a Leadership Report and Group Report. MHS invites you to join the EQ-i 2.0 Portal Community to discuss these reports, and other ways to improve your client's EQ-i 2.0 Experience.

Table 5.1. Client vs. Coach Report Sections

	Client Section	Coach Section
Who is it for?	Goes to the respondent if the administrator or another qualified practitioner is providing one-on-one feedback	Goes to the qualified practitioner interpreting the scores, giving feedback, or making decisions
What does it contain?	• An introduction to the EQ-i 2.0 Model of Emotional Intelligence • A profile graph showing relative results on each subscale, and their scores and/or range labels • A detailed, personalized interpretation for each of the 15 subscales • Information on areas that may be out of balance (optional) • A Happiness barometer of emotional health and well-being • An Action Plan (optional) • A Development Commitment (optional)	• An interpretation of the individual's Response Style, highlighting areas for further investigation • A profile graph showing relative results on each subscale, and their scores and range labels • A Happiness barometer of emotional health and well-being • A Balancing EI section offering information on areas that may be out of balance (optional) • A complete list of items and their responses • A list of follow-up questions (optional) • An Action Plan (optional) • A Development Commitment (optional) • A guide to conducting a debrief/feedback session with the respondent (optional)

Table 5.2. EQ-i 2.0 Quick Report Default Settings

	Client Section		Coach Section	
Profile Graph	Scores	ON	Confidence Intervals	OFF
	Range labels	ON		
Interpretation Text	Balancing Your EI sections on each subscale page	ON	Balancing Your Client's EI section	ON
Action Plan	Action Plan	ON	Action Plan	ON
Development Commitment Page	Development Commitment Page	ON	Development Commitment Page	ON
Follow-Up Questions			Follow-up Questions	ON
Coach's Guide to EQ-i 2.0 Debrief Session			Coach's Guide	ON

Table 5.3. Workplace Report Customization Options

	Client Section	Coach Section
Cover	You can add a title, logo, and/or organization name to cover pages.	
Profile Graph	You can turn off either the scores or the labels on the profile graph if you wish to provide your own interpretive context.	You can show Confidence Intervals on the profile graph to show the range of values likely to include the respondent's true score for each subscale.
Interpretation Text	You can omit the Balancing Your EI section from each subscale page if you have less time with your client to discuss the ways that subscales affect each other.	You can omit the Balancing Your Client's EI section from your coach report if you are already familiar with the way the subscales affect each other.
Action Plan	You can omit the Action plan page from your client's report if you don't require guidance on the selection of target EI behaviors to develop.	You can omit the Action plan page from your version of the report if you don't require guidance on the selection of target EI behaviors to develop.

Table 5.3. Workplace Report Customization Options *(Continued)*

	Client Section	Coach Section
Development Commitment Page	You can omit this page from your client's report if you don't require that your client confirm next steps in writing.	You can omit this page from your version of the report if you don't require a copy of your client's next steps in writing.
Follow-Up Questions		You can opt to include a list of follow-up questions for each subscale in your version of the report. These questions are useful when the EQ-i 2.0 results are being used for selection, or when more insight is required during the debrief session.
Coach's Guide to EQ-i 2.0 Debrief Session		You can omit this section from your version of the report if you are comfortable giving EQ-i 2.0 feedback and exploring the ways the subscales affect your client's performance and job satisfaction.

Using the Default Report Settings

The Quick Report option has been designed to speed new users through the report customization process by providing a recommended set of sections and information. To change these default settings, see the *Customizing Report Contents* section.

Workplace Success: Quick Report Default Settings

The Workplace Report Quick Report settings (Table 5.2) are intended for use by coaches using the EQ-i 2.0 as a development tool, and for those new to the EQ-i 2.0. By default, almost all settings are ON (except for Confidence Intervals, for which the default appearance is OFF). Interpretation aids are provided, such as text on Balancing EI, and feedback tools such as Follow-Up Questions and Action Plans help guide your EQ-i 2.0 conversations.

Sample Client and Coach Reports using the Quick Report default settings are available when you log in to the EQ-i 2.0 Portal. Each option is defined in more detail as you generate reports and in the following section.

Customizing Report Contents

You can opt to include certain features and sections in the Workplace Report. The Quick Report option works best for those new to the EQ-i 2.0 who prefer a guided interpretation. If you're familiar with the EQ-i and have established coaching resources in your practice, you might prefer to change these default settings (Table 5.3).

III

Administering a Multirater EQ 360 2.0

The aim of this section is to familiarize the user with test administration procedures for the EQ 360 2.0 assessment.

Chapter 6 details the importance of securing organizational support for a 360 degree feedback initiative, including gaining buy-in from the management team and addressing typical confidentiality concerns regarding this type of assessment. Guidelines for selecting appropriate EQ 360 2.0 raters are provided, and steps to adequately prepare the participant and raters to complete the assessment (i.e., describing the goal, procedure and expectations) are outlined.

Chapter 7 specifies setup and scoring guidelines for the EQ 360 2.0. Necessary materials to complete the assessment, such as a computer and internet connection, are stipulated. The time to complete the assessment (i.e., an average of 20 minutes), as well as the simple, four-step administration process are detailed. Step one involves inviting the participant; step two entails inviting raters (i.e., managers, peers, direct reports, family/friends and/or other individuals) to assess the participant; step three includes monitoring the progress of EQ 360 2.0 test completion; step four involves creating a report that contains results of the assessment.

CHAPTER 6

Planning the EQ 360 2.0 Assessment Process

Planning a successful EQ 360® 2.0 administration involves a few additional considerations beyond the ones covered in chapter 5 of this User's Handbook. This chapter provides 360-specific best practices and recommendations aimed to reduce the administrative complexity of the 360 process. Although many online features have been added to streamline the setup and administration of the EQ 360 2.0, you should take the time to properly plan the 360 process before you even reach the setup stage to greatly reduce the chance of any logistical issues popping up later in the process.

Due to the complexity of a multirater assessment, prepare to be faced with different schedules, several correspondences, and many questions. Some questions need to be addressed early in the assessment process, long before the participants fill out the actual inventory. Common questions asked by participants early on in the administration process include (but are not limited to):

- Why have we been chosen to participate?
- How will the results be used?
- How will confidentiality be ensured?
- How will the raters be chosen?
- How many raters need to be chosen?
- When does the inventory need to be completed by?
- Will there be any follow-up once the inventory has been completed?

Addressing these questions early in the 360 initiative will help the participants, the administrator, and the organization get the most out of the process and the results by fostering a climate of trust and shared understanding. Since not all people invited to take part in the EQ 360 2.0 will actually follow through with the assessment due to work demands or other reasons, 100% participation is sometimes not possible. Low response rates, however, invariably denote problems with the survey process, poor timing, or respondent attitudes towards the survey.

The best practices provided in this chapter can help you implement an effective EQ 360 2.0 administration with maximum participation. These principles are summarized in Table 6.1.

Table 6.1. Multirater Assessment Planning Dos and Don'ts

Do	Don't
Identify what the organization or individual hopes to gain from the process by connecting it to specific business needs. Clearly state the goal (e.g., EQ 360 2.0 assessment will be used to improve leadership skills) and how the company will get there (e.g., through the assessment, coaching, and development of skills).	**Forget to communicate the purpose of the assessment.** Participants should understand what behaviors will be measured and how it is relevant to their jobs and the organization. It is much easier to gain people's commitment if participants believe the behaviors that will be measured by the assessment tool will be directly related to improving individual and organizational performance.
Prepare a business case. Make the value proposition of the EQ 360 2.0 very clear by linking it to the organization's strategic objectives. Senior management will want to know what are the costs and benefits of the initiative. Well-constructed summaries of research that demonstrate the benefits of EI can have an enormous influence on the decision-making of senior executives. The best EI business cases show a return on investment (ROI) such as increased sales, better customer satisfaction ratings, or higher productivity. It may also be beneficial to list some companies that have used EI assessments. Most organizations like to know what other companies and competitors are using to get an edge.	**Ignore senior management.** Start by speaking with senior management on how critical it is to track organizational and individual growth and development. Just as a company would collect and analyze its financial information, information about change initiatives should also be analyzed to understand what impact the human resources side of the equation has on overall productivity. Senior management may ask to participate in a pilot study to assess the application of the EQ 360 2.0.
Consider the timing of the assessment. Be sensitive to what is going on in the organization that might get in the way of a successful 360 implementation. For example, midway through a downsizing may not be the best time to conduct a 360 assessment.	**Assume everyone's schedule is open.** Consider the availability of managers, raters, and stakeholders (e.g., are there many participants on vacation or away from the office for an extended period?) and whether there are other survey-intensive activities occurring at the same time. If so, reschedule the assessment to a more convenient time.
Involve any necessary stakeholders in decisions around who can select raters and who will have access to the results.	**Leave the participant out of the rater selection process.** They have the best sense of who interacts with them most and will feel more accountable to the results if they have input in selecting raters.

Consider the following questions before you begin any EQ 360 2.0 administration:

- Is it the right time for the organization to incorporate a 360-degree assessment?
- Are there circumstances that might hinder a successful implementation?
- Which people within the organization do you involve (e.g., senior management, middle managers, line managers, human resources)?
- What is the organization's purpose in collecting this information?
- How will the results be conveyed and stored?
- What methods will be put in place to ensure confidentiality and anonymity of results?
- Who will be giving the feedback?
- Who will be facilitating the development and action planning? Are they the same person?

By gathering strategic information upfront, you will be better equipped to gain buy-in from the organization.

Getting Organizational Buy-In

When possible, share the details of the EQ 360 2.0 assessment with the senior management team. The administrator can communicate such issues as what resources will be required, time commitment sample timelines, and information about the instrument that will be used. Keep in mind that some individuals within this team may not have heard about emotional intelligence or may not understand what emotional intelligence is. Therefore, a brief definition of EI and the scales of the EQ 360 2.0 will serve to get people thinking in the same direction. Because the scales of the EQ 360 2.0 have good face validity, most prospects quickly see for themselves how these skills would facilitate individual and organizational success.

It may also be advantageous to mention that the EQ-i 2.0® and EQ 360 2.0 were created from over twenty years of research demonstrating the importance of emotional intelligence in the workplace, and that EI skills can be learned. EQ 360 2.0 assessment efforts should not be undertaken unless there is strong and visible support from senior executives. In order to achieve maximum payoff from the assessment, executives should provide the administrator adequate resources for completion, a commitment to ongoing follow-up, as well as a visible presence throughout the assessment and development phases. For more information on gaining support for your EI initiative, refer to chapter 4.

Selecting EQ 360 2.0 Raters

As part of an EQ 360 2.0 assessment, raters must be recruited for each individual who is to be assessed (also referred to as the "participant" in this guide). Recruiting can be handled by the administrator, the participant, or both. Whoever is involved in the recruiting process must understand that the interpretability and the usefulness of EQ 360 2.0 results rest on the careful assignment of raters to the correct rater groups. There are five rater groups: (1) managers, (2) peers, (3) direct reports, (4) family/friends, and (5) others. These groups will be described in detail later in this chapter.

In accordance with the multirater approach, each rater group should include as many raters as possible. For each participant, it is recommended that a minimum of three raters be included in each rater group involved in the assessment, although it is common for the manager group to only contain one manager. Inclusion of a sufficient number of raters in each group not only helps to increase the quality of feedback obtained from the particular groups that participate in the assessment, but also helps ensure the confidentiality of the responses provided by each rater within the group. If there are too few raters (i.e., less than three) in the peers, direct reports or friends/family groups to meet the confidentiality requirement, all raters in that group should be assigned to the "other" rater group. Bear in mind that the quality of feedback increases when the number of raters increases, and the robustness of the overall assessment also increases with the number of rater groups involved.

Selecting the right raters is generally not a straightforward process. Figuring out who will choose the raters, who to choose as raters, and what criteria to use for both can be difficult. Choosing who selects the raters is generally performed either by the organization (i.e., Human Resources), the participant's manager, or the participant. It is, however, important that organizations allow participant input into the rater selection process. Perhaps the participant selects several peers, clients, direct reports and knowledgeable co-workers. Then either the participant's manager or Human Resources selects several more to round out the rater groups.

Some participants might choose certain raters in order to minimize negative feedback, either in the hopes of improving the chance of being seen in a positive light, or out of a belief that the positive results may increase chances of a promotion or monetary gain. A representative of the organization should speak to participants before completion of the inventories in order to make clear that the assessment is for developmental purposes only. This way people can seek honest feedback from the right people, receive information that might truly be helpful, and not worry about hurting their chances of promotion or financial gain.

Be sure to consider the purpose of the EQ 360 2.0 assessment and the type of information required from it when

selecting raters. Determine the number of raters that will provide the most robust information for the participant. The more diligently the raters are selected, the more reliable the assessment tool will be.

Issues to Consider When Selecting Raters

Choose raters who...

1. are credible and trustworthy. Raters with these characteristics will give fair and accurate information. These individuals generally will not inflate results that are not deserved and will not be malicious or opportunistic.
2. work closely with the person being assessed. These people are in a better position to rate the individual's performance in different settings.
3. have worked with the person being assessed for some time (more than 1 year). They will be more familiar with how the individual performs in different areas.
4. have worked with the individual being assessed for a shorter period of time (less than 1 year); they will be more likely to respond given the current context and be less swayed by history.
5. represent as many different groups as needed. Each rater group offers a perspective of performance that raters from the other groups may not observe, and certain rater groups are better than others at rating certain aspects of behavior (e.g., direct reports are the targets and therefore the best observers of leadership).

Rater Definitions

In most organizations, assessments will be based on the manager, peer, and direct report groups. Although the administrator should strive to maximize the number of raters per group, many participants will have only one manager, and some will not have individuals who report directly to them.

Discuss with your client whether the rater definition you use will be narrow or broad so that results from similar raters can be pooled and interpreted in a meaningful way. For smaller organizations with fewer potential raters, a broad definition may be most appropriate. For larger organizations, however, potential raters will be more plentiful, allowing a narrower approach to defining rater groups. Broad and narrow rater definitions are suggested in the following examples.

Manager

- Narrow: A manager, supervisor or director who the participant reports to within the organizational chain of command.
- Broad: Any individual within the organization who holds a position or rank above that of the participant.

Peer

- Narrow: Any coworker or colleague in the participant's work environment who holds a similar rank within the organizational hierarchy.
- Broad: Any individual who works with the participant on an equal one-to-one basis.

Direct Report

- Narrow: Any individual who is responsible to, or reports directly to, the participant.
- Broad: Any individual holding a lower rank or position relative to the participant within the organizational context.

Family/Friend

- Narrow: A member of the participant's immediate family or a close friend outside of the workplace.
- Broad: A member of the participant's extended family, a guardian or godparent, or an acquaintance outside of the participant's workplace.

Other

- Narrow: Any person not fitting the above definitions (e.g., an external or internal customer or client), or someone who belongs to more than one rater group (e.g., a worker peer who is also a close friend or family member).
- Broad: The Other rater group designation can be utilized by the administrator to combine raters from more than one category. This option may be useful, for example, for combining rater groups that consist of one rater each with raters from other groups. Since showing the participant any results in which a rater could be identified represents a clear violation of rater confidentiality, the system will not allow you to generate results for peers, direct reports, family/friend or Other groups with fewer than three raters. Using the Other rater group will ensure rater confidentiality while capitalizing on feedback from raters who would otherwise be unheard.

Preparing Participants and Raters

Speaking with the participant and raters before the administration is essential to completing a successful EQ 360 2.0 assessment. All individuals participating in the 360 process need to have an understanding of the purpose, process and expectations of the assessment. The more individuals understand about why a 360-degree assessment is being introduced into the organization and how the information will be used, the more likely participants are to support the effort.

Participants should be notified of a meeting to discuss the 360 process well in advance of the administration of the

instrument. The meeting notification should be distributed to all participants and senior management. The notification should include information about the importance of attending the meeting, as well as a meeting agenda.

Why is it important to share information with the raters upfront?

Creating a positive atmosphere will translate into frank responses and more accurate results. You should reassure raters that there are no right or wrong answers and that there is no time limit. Also, define what the concepts of confidentiality and anonymity mean in relation to the EQ 360 2.0. Assuring the raters that all individuals being assessed will receive valuable feedback about the results, as well as emphasizing the positive and constructive potential of those results, will assist in building rapport.

Issues to Consider when Preparing Participants and Raters

- Depending on the knowledge and experience level of the participants, the administrator may want to discuss the construct of emotional intelligence, how the construct is important to job performance, what a 360-degree assessment is, the EQ 360 2.0 and definitions of its scales, how long it will take to complete, and the look of the report.
- Discuss with the participant and raters the expected outcomes of the assessment – what do they want to get out of it?
- Discuss with the participant and raters the reason why they were selected to participate.
- Discuss with the participants their right to confidentiality, informed consent, where their data will be kept, and who will have access to their data.
- Discuss the importance of providing answers that are honest and reflect current functioning.
- Discuss with the participants and raters how they will receive ongoing support and follow-up. Participants need clarification about what is expected of them after they receive their feedback. Raters need to hear what outcomes will result from their feedback; will they be involved in the action planning process or subsequent progress check points? In any case, participants and raters need to know that the 360-degree assessment is not a one-time event, nor one that is a replacement for having healthy and timely conversations around performance.

In an organizational setting, it may be most efficient to introduce the EQ 360 2.0 at a meeting attended by all intended participants or through a well-detailed email. This will help to ensure that all the participants and potential raters are equally and fully informed about what is entailed in the assessment process, and will provide the administrator with the opportunity to address important questions or concerns prior to beginning the process.

The general approach to introducing the EQ 360 2.0 is to stress the positive, constructive, and beneficial aspects of the assessment. Encourage questions and attempt to answer them in a manner that will not bias the ratings.

Introducing EI and the EQ 360 2.0

Briefly describe the inventory, the number of items, the response format, and how long it takes to complete the questions (approximately 20 minutes). Stress that the EQ 360 2.0 is not a test. Explain that it is designed to provide the participant with a meaningful learning experience and a chance to develop one's self. You can also say that the participant will benefit personally from the feedback that arises from the EQ 360 2.0. The results will help identify the individual's stronger abilities and skills as well as those areas that need to be strengthened in order to increase his or her ability to cope more efficiently with daily demands in various areas of life.

Convey to raters and participants that their participation will help the participant to identify personal strengths, as well as facilitate personal growth where weaker areas are observed.

You may wish to hand out an instructional letter following a group discussion, have the participant distribute a letter among his or her raters, or create an email communication that a senior staff member can send to participants. In cases where preparatory meetings and discussion are not feasible, it is recommended that you create an introductory educational document and allow time for participants' concerns to be addressed before sending administration instructions. When used in lieu of a preparatory meeting, a primary introductory correspondence should include:

- A brief description of the EQ 360 2.0
- Reasons why they are being asked to complete the EQ 360 2.0 and the benefits of their participation
- An explanation of how aggregate results help to maintain anonymity
- That their participation is voluntary and they are free to withdraw at any time
- What will be done with the results
- Who to contact with questions or concerns

Regardless of your preparatory methods, it is essential that detailed written instructions be provided to the raters about proper conditions for instrument completion. The administration instructions should reiterate the purpose of the assessment, why emotional intelligence is being measured, the importance of honest responses, why the participant was selected, and that they are free to withdraw at any time.

CHAPTER 7

EQ 360 2.0 Setup and Scoring

To start using the EQ 360® 2.0, log in to your EQ-i® 2.0 Portal account and click the Assessments tab. Select the EQ 360 2.0 and follow the instructions on your screen. Figure 7.1 shows the four steps in the 360 process: Invite (to invite the participant being rated), Nominate Raters (to invite observers), Track Completion (to manage assessments), and Report (to select and create reports).

Table 7.1. Using the EQ 360 2.0

Step 1	
Invite a Participant	Email participants directly from your MHS account. Your client receives a unique link to take the self-report version of the EQ 360 2.0 online. There is no charge for completing the assessment. You can set up new participants in the EQ 360 2.0 assessment, or import any EQ-i 2.0 results within the last 3 months. You can also use the Open Invitation to send a universal link to multiple participants.
Step 2	
Nominate Raters	As part of completing the self-report, each participant can nominate peers, direct reports, managers, family/friends and other raters to take the EQ 360 2.0. Raters automatically receive an email link, and their responses are saved with the participant's self-report data.
Step 3	
Track Completion	Your account dashboard shows you who has completed the EQ 360 2.0 so you can track raters and know when you're ready to create reports. You can also email reminders automatically from your portal account.
Step 4	
Create a Report	Pay for customizable reports using tokens. You can purchase tokens in advance and spend them on any 2.0 product, or pay when you generate results. You can add your logo, custom title, and select which report features are right for your client. Templates allow you to save your favorite settings for later.

Required Materials

The EQ 360 2.0 is administered in an online (web-based) format. Each respondent will require:

- A personal computer with internet access equipped with Microsoft Explorer version 8.0 (or higher) or Mozilla Firefox version 3.0 (or higher). More recent versions of these browsers will provide optimum functioning on the website.
- A unique link to take the EQ 360 2.0 (sent from the administrator's EQ-i 2.0 Portal account).
- When you set up an EQ-i 2.0 Portal login ID and password with an MHS representative, you will be provided with access to the EQ-i 2.0 Portal that allows you to administer multiple MHS online instruments. Full instructions and online help are available after login.

Administration Time

Most raters will need approximately 20 minutes to complete the EQ 360 2.0. It should be noted, however, that completion of the EQ 360 2.0 assessment might take longer for individuals who have a first language other than English or have difficulty reading and/or comprehending the items.

While there are no imposed time limits for completing the EQ 360 2.0, raters should complete the inventory during one sitting, without interruption, and work at a steady pace.

Generally, 360 administrators allow 2-4 weeks to collect responses from all the raters.

Step 1. Invite a Participant

To start the EQ 360 2.0 administration process, set up a participant (the respondent being rated by others) to take the self-report version of the EQ 360 2.0. You can choose one of the five options illustrated in Figure 7.2.

When you send an invitation link through the Personal Invitation option, participants will receive the standard text shown in Figure 7.3. This text is not editable. The highlighted section is shown if you opt to allow the participant to nominate his or her own raters. (Note: The invitation email will be sent from "NoReply@mhs.com". For information on how to send the email from your own email address, please refer to chapter 5.)

Figure 7.1. The EQ 360 2.0 Administration Process

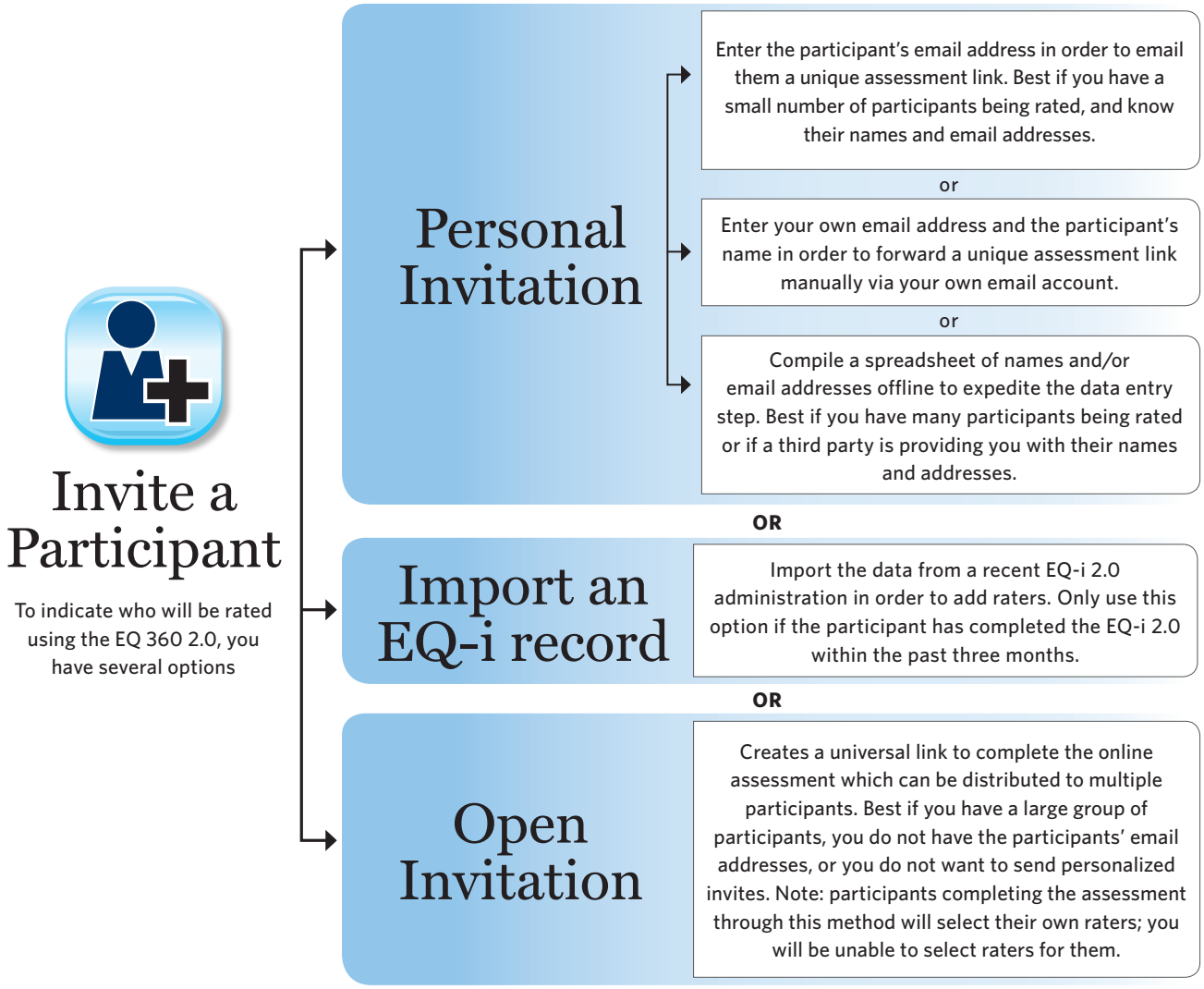


Figure 7.2. Invitation Email to a Participant

Dear **{Participant_Firstname}**,

You are being asked to take the EQ 360 2.0 assessment.

- Complete the EQ 360 2.0 by **{Expiry_Date}**. To complete your assessment online, click **{Unique_URL}**.
- Schedule 15 to 20 minutes when you can relax and concentrate on completing the assessment. It is important to ensure that you are feeling well rested and that you select a quiet setting that is free from distraction.
- Complete the assessment in one sitting. Your responses to the items should be made independently without any consultation with friends or family members. If English is not your first language, it could be helpful to have a dictionary with you so that you can refer to it as needed.
- After completing the assessment you will be asked to select some people, or raters, to evaluate you. These people should include a manager if possible. Please select a mix of people, some who know you well, and some not as much. They can be managers, peers, friends/family, or direct reports. There is also an Other/Mixed category for people who may fit into more than one grouping, or who do not fit into any of them.
- Once you have selected your raters, you can enter their email addresses via the above link. Should you wish to nominate raters at a later point, you can re-enter into the system at any time.

Please contact your administrator if you have any questions about your EQ 360 2.0 assessment.

Sincerely,

Your EQ 360 2.0 Team

This email has been generated automatically by MHS.

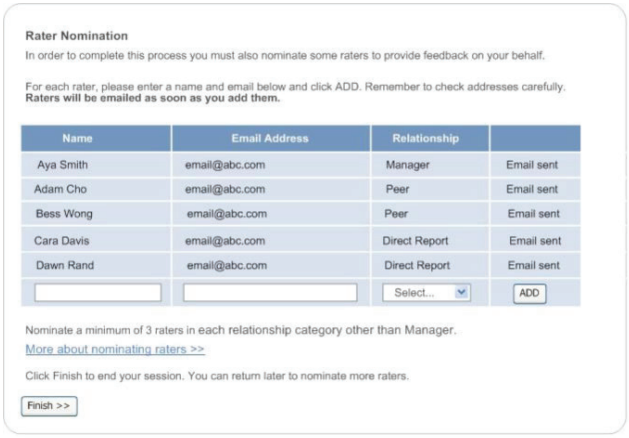
You can also set the invitation link to expire, and send automated reminders if the assessment remains incomplete. Regardless of your method of inviting participants, you can group participants into folders for organizational purposes, and enter in your own email address or that of a third party to receive notifications when assessments are completed by participants and their raters.

Step 2. Nominate Raters

During the rater nomination process, raters must be assigned to the correct rater group. This is a highly important step that is necessary to ensure that the results are interpretable and that the benefit of the resulting 360-degree feedback is maximized. In accordance with the 360-degree multirater approach, the EQ 360 2.0 assessment should include raters who relate with the participant on a variety of levels.

The administrator is responsible for assigning rater groups; however, the participant can also be allowed to nominate raters. If the administrator allows it, the participant will see a Rater Nomination (Figure 7.3) screen upon completing the self-report online. The participant can return to this screen at any time by clicking the invitation link. Nominated raters will receive a unique link via email to take the EQ 360 2.0.

Figure 7.3. Rater Invitation



When assigning rater groups, please use the following guidelines:

- When assessing someone in a professional environment, it is important to include Managers, Peers, and Direct Reports in the EQ 360 2.0 process as they will provide pertinent information about the participant. It may be useful in certain situations to include clients and/or family members as a rater group, depending on what outcome you want from the assessment.
- To provide confidentiality, there must be at least three raters in any of the following categories: Peers, Direct Reports, and Friends/Family. When there are fewer than three raters in a particular category, those raters will be moved into the Other category.
- Anyone with a supervisory influence on the participant should be in the Manager category. If there is only one Manager, it is at the discretion of the administrator to keep the Manager in this category or move this person into the Other category.
- If the Manager category has fewer than three respondents, you must inform these individuals that their responses will not be confidential.
- Involve the Manager as much as possible in creating and monitoring the participant's development strategies.
- Educate the participant on 360-degree assessments (i.e., their purpose and use), emotional intelligence (i.e., the construct and the subscales), confidentiality, feedback, and the development of skills after the assessment.

Administrators and participants can nominate new raters after a report is scored (for a period of 6 weeks after the report has been scored), which can be helpful if additional raters are required to meet the anonymity guidelines for certain rater groups. Complete rater groups will provide a more complete picture of the participant's emotional and social functioning.

Rater Invitations

Raters can be nominated by the administrator during setup, and optionally by the participant at the end of the EQ 360 2.0 self-report online. Raters receive the standard text shown in Figure 7.4. This text is not editable. The language of the rater invitation is selected during the nomination.

Raters do not see their rater group during administration. Upon accessing the EQ 360 2.0, raters can read additional information about confidentiality and the privacy of their data in "What you need to know about the EQ 360 2.0"; however, raters should be properly briefed about the purpose and scope of the assessment before they are invited to participate. Please refer to chapter 6 for information on preparing raters.

Adding Comments

You can add up to five questions for raters to respond to in a short-answer comment format. Comments will appear verbatim in the Client and Coach sections of the report. You can select any combination of your own questions and the standard ones provided.

Figure 7.4. Invitation Email to Raters

Dear **{Rater_Name}**;

Welcome to the EQ 360 2.0. You are invited on behalf of **{Participant_Fullname}** to assess his or her emotional intelligence. Please complete the EQ 360 2.0 by **{Expiry_Date}**.

To complete your assessment online, click **{Unique_URL}**.

This assessment should take approximately 20 to 30 minutes to complete.

Your responses will be recorded anonymously and grouped with those of other observers who have a similar relationship with this person (e.g., other direct reports, other peers). If you are this person's Manager, your responses will not be anonymous.

If you have any questions about this assessment, please go to **{Unique_URL}.** Please do not reply to this email.

Thank you for your participation. Your honest feedback will be beneficial in **{Participant_Firstname}**'s development process.

Sincerely,

Your EQ 360 2.0 Team

This email has been generated automatically by MHS.

How can I customize the EQ 360 2.0 assessment?

You can compose your own questions, or choose from the following eight optional questions:

- ☐ What areas of leadership do you believe are strengths for this individual?
- ☐ What areas of leadership do you believe are opportunities for growth for this individual?
- ☐ How does this individual involve others in the decision-making process?
- ☐ When challenges arise in the workplace, how does this individual respond?
- ☐ How does this individual respond when resolving conflicts?
- ☐ What should this individual do more?
- ☐ What should this individual do less?
- ☐ Describe the overall quality of your relationship with this person.

• A maximum of five questions will help to ensure that your inquiries are targeted and prevent rater fatigue.

Step 3. Track Completion

You can log in to your EQ-i 2.0 Portal account at any time and check on the progress of an EQ 360 2.0 assessment. Simply click Assessments, select the EQ 360 2.0, and click the Manage button. Locate your participant using the filters provided and click Details to modify participant information, comments, and rater nominations.

You can add, remove, or modify comments up until the first rater has completed the EQ 360 2.0, after which time the comments are locked in to ensure a consistent inventory.

You can nominate additional raters and change their relationship to the participant up to six weeks following the first report you generate for a participant. This feature allows you to correct for any rater groups not meeting the rater anonymity rules (e.g., 2 direct reports). It is not advisable to experiment with changing rater relationships in order to change the outcomes of the EQ 360 2.0. For this reason, the only rater relationship adjustment you can make is to change a rater in any rater group to the "Other" rater category.

Rater Anonymity Rules

EQ 360 2.0 rater results are anonymous. At no time can an EQ 360 2.0 administrator or respondent access the individual responses tied to the rater who provided them, except in the case of manager ratings.

All of the EQ 360 2.0 assessments within each rater category are scored together as an aggregate. In other words, ratings from peers are combined into one group, direct reports are combined into another group, and family/friends are combined into another. Results are presented in aggregate or summed form in the reports for each of these groups. Results for each scale are presented graphically by rater category. Ratings are presented for each individual item as the average rating (or response) across each rater group.

In order to ensure anonymity of raters, participants are encouraged to nominate 3 or more raters in each category. If there is only one rater in a category, those results are omitted from the report unless they are combined with another rater group. The only exception to the above is the manager category, because most employees do not report to more than one manager. The managers should be made aware that their results will be graphed and scale scores reported even if there are fewer than 3 managers.

What do I do if there aren't enough raters in a category?

You can reassign raters to the "Other" category to ensure there are at least three raters in each rater group.

For example, let's say that only four people completed Mary's EQ 360 2.0: one was her manager, two were her peers, and one was her spouse. There are not enough raters in her peer and family groups to protect rater anonymity, so these raters can be moved to the "Other" category. The resulting report will show Mary's manager as one group, and the remaining respondents aggregated as a second group.

Administrators can re-assign raters to the Other group, even after scoring. To prevent misinterpretation of data, raters can only be re-assigned to the "Other" group.

Step 4. Create a Report

Results for the EQ 360 2.0 are generated via the Multirater Feedback Report, which is unique to EQ 360 2.0 administrations. This report combines rater results and compares them to the participant's self-ratings. You do not need to generate a separate EQ-i 2.0 report for the participant.

EQ 360 2.0 Feedback: Quick Report Default Settings

The EQ 360 2.0 Feedback Quick Report settings (Table 7.2) are intended for use by coaches using the EQ 360 2.0 as a development tool, and for those new to the EQ 360 2.0. By default, all settings are ON, except for Confidence Intervals, for which the default setting is OFF. Feedback tools such as Follow-Up Questions and Action Plans help guide your debrief session and development activities.

Table 7.2. EQ 360 2.0 Feedback Quick Report Default Settings

	Client Section		Coach Section	
Profile Graph	Scores	ON	Confidence Intervals	OFF
Balancing EI	Balancing EI	ON	Balancing EI	ON
Action Plan	Action Plan	ON	Action Plan	ON
Development Commitment Page	Development Commitment Page	ON	Development Commitment Page	ON
Follow-Up Questions			Follow-up Questions	ON
Coach's Guide to EQ-i 2.0 DebriefSession			Coach's Guide	ON

Sample Client and Coach Reports using the Quick Report default settings are available when you log in to the EQ-i 2.0 Portal. Each option is defined in more detail when you generate reports and in chapter 5 of this Handbook.

What if I already purchased a Workplace Report for this participant?

When a scored EQ-i 2.0 report is imported into a 360, the full EQ 360 2.0 report price is charged. There is no discount for tokens spent on self-reports since you are generating an entirely new report.

IV Using the Results

This section covers all topics related to the process of interpreting the results of the EQ-i 2.0.

Chapter 8 will detail how EQ-i 2.0 scores are derived including the concepts of norms, standard scores and confidence intervals. A step-by-step interpretation sequence walks you through interpreting your client's report; from understanding validity indicators and predicting possible emotional and social implications of a particular score, to leading you through the process of building development strategies for your client.

Chapter 9 covers the feedback process and recommendations for best practices as they relate to debriefing the EQ-i 2.0 and EQ 360 2.0 with your clients. The importance of establishing meaningful feedback goals, and the responsibilities of the coach, consultant, counselor or HR professional are outlined.

Chapter 10 contains an overview of coaching strategies and techniques that align with the EQ-i 2.0 and EQ 360 2.0. Strategies presented include both individual and group-based coaching techniques along with best practices to ensure that the EQ-i 2.0 can be integrated into any coaching relationship/practice.

Chapter 11 shows the EQ-i 2.0 in action. Real case studies representing the interpretation of EQ-i 2.0 profiles as well as recommended coaching and development strategies are presented.

CHAPTER 8

Understanding the Results

This chapter describes how to interpret EQ-i® 2.0 results and how to make them meaningful and useful in corporate, educational, clinical, medical and research settings. By no means is this chapter all-encompassing, and therefore the interpretation of results must be the responsibility of a certified administrator or qualified counselor, psychologist, consultant or coach. When available, the inclusion of additional information, such as other assessment results, interviews, or observations is highly recommended to increase the accuracy of the assessment process.

Although different styles of coaching and feedback exist, the interpretation of an EQ-i 2.0 report must follow a standard practice. This chapter outlines how to interpret a client's report in a manner that is true to how the test was constructed and designed to be interpreted. This chapter follows the standards for test interpretation outlined by a committee of the American Educational Research Association, American Psychological Association and National Council on Measurement in Education (1999), and when followed will provide a consistent and ethical structure to your debriefing conversations. Remember, there are many options when building a report that allow you the freedom to discuss results in a way that is most comfortable to you (e.g., turning scores or score labels off); however, the interpretation of results as outlined in this chapter upholds a standard message that all test takers should hear in order to create a consistent, insightful and ethical experience of the EQ-i 2.0 assessment process.

The EQ-i 2.0 has undergone significant changes particularly in the way validity information is presented and interpreted in the Coach's report. As you read through this chapter, please pay particular attention to the following major changes:

- Norm group
- Negative and Positive Impression Indexes
- Removal of Correction Factors
- Removal of Critical Items
- Inconsistency Index
- Confidence Intervals
- New Composite Scales and Subscales

How the EQ-i 2.0 Scores are Derived

Understanding Norms

Norms are a set of data that is collected on a large, representative sample of people. For the EQ-i 2.0, 4,000 people completed the assessment in 2010, and these responses were grouped into what we refer to as a Norm group. You may also see this Norm group referred to as the General Population, and that is essentially what it represents. Because we can't sample everyone in the world, we take the next best thing, which is a representative group of people against which your client's score is compared.

EQ 360 2.0

The EQ 360® 2.0 also has its own norm group. In 2010, 3,200 people were asked to complete the EQ 360 2.0 as either a direct report (i.e., the ratee is the rater's manager), manager (i.e., the ratee is the rater's direct report), work peer, and friend/family member. When scoring an EQ 360 2.0 you will ultimately be using this norm group to generate the standard scores you see in the EQ 360 2.0 report.

Norms are used as a benchmark to transform your client's raw scores into standard scores. In the case of the EQ-i 2.0, your client's score is compared to the scores of 4,000 people in the general population so that you know how he/she did relative to everyone else.

Scores for the EQ-i 2.0 norm group closely resemble a normal curve so you can make accurate conclusions about where the majority of respondents score on the EQ-i 2.0. Breaking the normal curve into quartiles provides a statistical reference for the 10 point cut-offs you see on the EQ-i 2.0 profile graph (i.e., low range, mid-range, high range). At the lower quartile, 25% of respondents score below 90, 50% of respondents score between 90-110 and 25% of respondents score above 110, which is the upper quartile.

Specific details on the composition of the EQ-i 2.0 Norm Group are outlined in chapter 13 and Appendix A.

General Population or Age and Gender Norms?

Selecting General Population when generating your report is appropriate in most cases. The use of General Population norms means you are comparing your client's score to everyone in the norm group, which is representative of most workplaces (i.e., men and women of all ages). It is important to know who you wish your participants' scores to be compared to, and if their personal circumstances are specific enough to require a specific age and gender comparison group. For instance, if you are working with a client who is in her first year of college, you may want to choose the female aged 18-24 norm to enhance the accuracy of your interpretation. Otherwise, a good rule of thumb is to choose the General Population norm group, and always take into account gender, age, cultural, environmental and career factors when interpreting the results obtained from the EQ-i 2.0.

Understanding Standard Scores

In the same fashion as the original EQ-i, the EQ-i 2.0 presents your client's results by using standard scores. Standard scores are scores that have been adjusted by comparing them to others' results on the same test. This adjustment allows you to make a comparison between scale scores (e.g., Empathy and Optimism) and makes interpretation possible because you now have a yardstick against which to measure. For instance, without standard scores it would be like your child telling you he scored a 75/100 on his math test. Would it change your opinion of his score if you knew the class average was 88/100 and that most students scored close to average? In this case, your son's score is significantly lower than most of the rest of the class.

EQ-i 2.0 standard scores are calculated from raw scores so that each scale has *the same average (mean) score of 100 and a standard deviation of 15*. A standard deviation is the average or expected amount of variance in data points around the mean. A large standard deviation means that data points are far away from the mean. For example, the following set of numbers would have a large standard deviation: 0, 0, 14, 14. A small standard deviation means that data points are tight and clustered closely around the mean. For example, the following set of numbers would have a small standard deviation even though the mean is the same as above: 6, 6, 8, 8.

Benefits of Standard Scores

- You can compare scores across different EQ-i 2.0 scales.
- You can compare EQ-i 2.0 scores with other instruments standardized the same way.
- You can automatically tell where the test taker's score is, relative to the average of the normative group.

You will rarely need to explain the concept of a standard score in the terms that have been used here. Instead, your client may ask you questions such as "Is my score high/low or good/bad?" or "How does my score compare to everyone else's?" You can answer these questions given what you now know about the EQ-i 2.0 standard scores. Your client's score is actually generated by comparing it to the norm group. You also know that the average is 100, so depending on where your client's result lies, you can provide an interpretation of where your client falls relative to the average.

Understanding Confidence Intervals

All measurements contain some error. Confidence Intervals[1] take this error into account by providing a range of scores, at a specific level of probability, within which an individual's true score is expected to fall. For the EQ-i 2.0 a 90% Confidence Interval was calculated, which allows you to say that 9 times out of 10 the individual's true score would fall within the range shown. For example, your client's Total EI score is 100. The 90% Confidence Interval for this score is 96-104 which allows you to say that nine times out of ten your client's true score would be between 96 and 104.

Confidence Intervals can help you gauge the differences between subscales. If two confidence intervals overlap a lot for two different subscales (see example below), then an individual's true scores on each of these subscales may not be that different from one another. If there is no overlap, or little overlap between confidence intervals, then the difference between the true scores for these subscales is probably fairly large.

Table 8.1. Examples of Confidence Intervals

Confidence Interval Overlap		
Subscale	**Score and Confidence Interval**	**Conclusion**
Empathy	100 (95-105)	The client's true Empathy score could fall anywhere between 95 and 105, whereas the true Flexibility score could fall anywhere between 96 and 112. Scores on these two subscales are similar.
Flexibility	104 (96-112)	
Confidence Intervals with no Overlap		
Subscale	**Score and Confidence Interval**	**Conclusion**
Empathy	76 (71-81)	The client's true Empathy score could fall anywhere between 71 and 81, whereas the true Flexibility score could fall anywhere between 82 and 98. Scores on these two subscales are quite different.
Flexibility	90 (82-98)	

[1] Confidence Intervals are an option you may turn on in the Coach's report. Confidence Intervals are never displayed in the Client's report.

Step by Step Interpretation Sequence

After the report has been generated by selecting the appropriate Norm group, the sensitive work of interpretation begins. Both the Coach and Client reports have been designed to intuitively follow the recommended interpretation sequence. That being said, merely issuing a report to the respondent without some degree of feedback verges on being unethical and allows the client to reach their own conclusions about their results. When providing extensive and individualized feedback is impractical (e.g., in hiring and screening situations), informed consent and debriefing procedures should still be adhered to. Should the case arise where a respondent requests their results and feedback; these must be made available to them in a safe fashion.

The Report

The EQ-i 2.0 reports have been designed with the interpretation process in mind, so that all the information you need is in the right place and in the right sequence for debriefing results. As well, because of the flexibility in customizing reports, you can create a report that works for you and your client.

Table 8.2 outlines the unique features of the Workplace Report and how you can leverage these features when working with your client. Not only do the features provide you with a wealth of information and questions you can ask, but they also save you the time and effort coming up with questions and templates yourself.

Table 8.3 outlines additional features in the EQ 360 2.0 report.

Table 8.2. Features of the EQ-i 2.0 Workplace Report: Leveraging Report Features

Feature	Where to find it	What it means	How it helps a Coach	Customization
Response Style Explained	• Coach's Report	This page gives you a snapshot of all the validity indicators that explain how your client responded to the items in the assessment.	You can clearly see if there are possible validity concerns with the way your client responded to the items on the EQ-i 2.0. There are recommended questions for delving into your client's approach to taking the EQ-i 2.0.	Cannot turn this feature off.
Balancing EI	• Client's Report – one comparison between subscales at the bottom of each subscale page • Coach's Report – three comparisons for each subscale	Each subscale is compared to related subscales to show where there may be balance or imbalance in a client's EI profile.	The comparison provides you with a narrative for feedback, which means you have a script you can follow when speaking to the importance of balance within EI subscales.	Can turn this feature off in either report.
Follow Up Questions	• Coach's Report	Every subscale lists 5-6 questions that you can ask to further understand your client's perspective on subscale scores.	Several thought-provoking questions are provided that you can ask your client when you are discussing a particular subscale.	Can turn this feature off.
Action Plan	• Client's Report • Coach's Report	Because of the developmental nature of the EQ-i 2.0, most clients will naturally move from understanding their results to creating a plan for further development. This is a template to help your client outline the steps required to achieve his or her development goals.	You do not need to create your own action plan. If you are only providing feedback for a client and not continuing to work with them on an ongoing basis, this is a value-added piece that leaves the client well prepared to develop EI in a self-directed manner.	Can turn this feature off in either report.
Development Commitment	• Client's Report • Coach's Report	This template allows you to reinforce the importance of development by asking the client to formally commit to their plan.	It ensures you have buy-in from the client.	Can turn this feature off in either report.
Coach's Guide to an EQ-i 2.0 Debrief Session	• Coach's Report	This is a step-by-step walkthrough of what a feedback session could look like.	For new coaches or new EQ-i 2.0 practitioners, it provides a clear process to follow, to ensure you cover everything in the feedback session, and also saves you time when preparing for your session.	Can turn this feature off.

Table 8.3. Additional Features of the EQ 360 2.0 Report: Leveraging Report Features

Feature	Where to find it	What it means	How it helps a Coach	Customization
Rater Response Style Explained	• Coach's Report	This page gives you a snapshot of the validity indicators for each rater group. Please note: validity concerns are not raised at the rater level, this information is provided so you can be better acquainted with your client's raters and their response patterns.	You can determine whether raters responded in an overly positive or negative manner, omitted items, or responsed inconsistently, and how they used the 5-point response scale.	Cannot turn this feature off
Profile Gap Analysis	• Client's Report • Coach's Report	Each subscale is plotted on a grid based on the client's self score and the average amount of agreement between this self score and the raters' scores.	This plot provides a visual of agreement and disagreement in your client's EI profile. It is a good starting place to have a general discussion on patterns, agreement, and disagreement, before moving on to more complex results.	Cannot turn this feature off
How You and Your Raters Responded: Summary Graph	• Client's Report • Coach's Report	Each rater group score is shown for all subscales on this one page. The length of the lines represents the range of scores your client received on each subscale.	You have everything you need on one page. You can examine patterns in the spread of scores, or the degree to which scores cluster. Or choose one rater symbol and look down the graph for trends in how that rater group responded relative to your client's self score.	Cannot turn this feature off

The following seven steps are recommended for interpreting the EQ-i 2.0 results.

EQ 360 2.0

The seven-step interpretation sequence applies to the EQ 360 2.0 as well. Although you have several groups' ratings of your client's EI skills, you can manage this information in the same way as described in the rest of this chapter.

Step 1: Assess the Validity of the Results

The validity of an individual's EQ-i 2.0 results needs to be evaluated before delving into the interpretation of subscale scores. For both the EQ-i 2.0 and the EQ 360 2.0, all validity information is presented on the first page of the Coach's Report called Response Style Explained. You must understand how to interpret the following five validity indices:

- Time to Completion
- Inconsistency Index (IncX)
- Positive and Negative Impression
- Item 133
- Omitted Items

Time to Completion

The time it took an individual to complete the EQ-i 2.0 online is displayed in minutes in the Participant Summary box at the top of the page. People who take less than seven minutes to complete the assessment may have responded in a random manner or rushed their responses. Those who take longer than 90 minutes may have had trouble understanding the items and instructions, were interrupted or distracted, or were trying to manipulate the results. For these reasons, if a client takes less than 7 minutes or more than 90 minutes a red flag will appear beside Time to Completion, as this warrants follow-up during the feedback process.

Inconsistency Index (IncX)

The Inconsistency Index (IncX) score measures how consistently an individual responded across the items on the EQ-i 2.0. Ten pairs of highly related items were chosen to detect whether an individual responds differently to items measuring similar content. An IncX score of 3 or higher would indicate that an individual's results are possibly invalid. In addition to random responding, elevated IncX scores could signify someone who is indecisive, heavily swayed by slight nuances in item wording, unsure of themself or lacking self-awareness. If a client has an IncX score of 3 or greater, a red flag will appear beside the Inconsistency Index, as this warrants follow-up during the feedback process. Investigate the responses to each item pair in the Item Responses section of the Coach's Report and ask the client about her approach to responding to the items.

Investigate any IncX score of 3 or greater. Possible reasons for an elevated IncX include:

- Random responding
- Indecisiveness
- Being swayed by slight nuances in item wording
- Being unsure of oneself
- Lack of self-awareness

Positive and Negative Impression Indexes

The Positive and Negative Impression (PI/NI) indexes detect respondents who may be giving an exaggerated positive (PI) or negative (NI) impression of themselves when responding to the items on the EQ-i 2.0. The same 6 items are used to measure PI and NI, where extreme responses (1 or 5) across all items are rare in the general population. In fact, a cut-off of 3 was established because only 5% of the general population scored 3 or higher. As described below, a cut-off of 3 applies to both indexes.

Positive Impression Index

When a PI score is 3 or higher, an individual's results should be interpreted with caution. This individual may have inflated his responses on purpose, or for other reasons which may include self-deception, lack of personal insight, criticism avoidance, unwillingness to face one's limitations, or misunderstanding the assessment's purpose. When the PI score is 3 or higher, a red flag appears beside Positive Impression to indicate that further investigation is warranted during feedback.

Further investigate any PI or NI score of three or higher.

Can my client have a score of three or higher on both PI and NI?

Yes, but it is extremely rare. In the normative sample of 4,000 people, not one respondent scored higher than 3 on both indexes. If however you do get this result for a client, discuss some of their item-level responses to better understand their style or approach when completing the EQ-i 2.0.

Negative Impression Index

When a NI score is 3 or higher, an individual's results should be interpreted with caution. This individual may have deflated his responses on purpose, or for other reasons which may include attempting to create a negative impression of oneself, seeking sympathy or help, low self-esteem, a self-critical response style, or misunderstanding the assessment's purpose. When the NI score is 3 or higher, a red flag appears beside Negative Impression to indicate that further investigation is warranted during feedback.

Correction Factors

The EQ-i 2.0 no longer uses correction factors, adjusted or unadjusted scores. Experience with the EQ-i suggests that such correction adds complexity to score interpretation that may offset any benefits. For further discussion about such corrections, see Piedmont et al. (2000) and Ellingson et al. (1999). For the EQ-i 2.0, we adopt the simpler approach of directly interpreting the NI and PI indexes, rather than applying an upward or downward adjustment to compensate for response style.

Critical Items

The EQ-i included 6 items that were designed to help identify depressive conditions, psychotic states, and the potential for losing control. Although in some cases these items were helpful, the inclusion of these items proved challenging in the corporate space. In an effort to move away from items addressing clinical topics, and to facilitate the broader use of the instrument (particularly in non-clinical environments such as corporate applications), the critical items have been removed in the revision of EQ-i.

Item 133

Item 133 states: My responses to the preceding sentences were open and honest.

Further investigate any Item 133 response of 3 or lower.

A response of 3 or lower indicates that the results of the EQ-i 2.0 are possibly invalid. Even a response of 4, Often, should be questioned as the respondent was not as honest or open as they could have been. A flag appears when a response of 3 or lower was provided; results should be interpreted with caution as honest answers may not have been provided.

Omitted Items

The EQ-i 2.0 is designed in such a way that respondents should be able to answer every item on the assessment. Nevertheless, because the items are not mandatory, it is possible for a respondent to choose to skip certain items. An overall omission rate is calculated by dividing the number of omitted items by 133 (the total number of items on the EQ-i 2.0) and multiplying by 100%. If the Overall Omission Rate is 8% or higher the results are considered to be invalid. A similar omission rate is calculated at the composite and subscale level, where an Omission Rate of 8% or higher renders the results for any particular scale invalid.

The number of missing items permitted for the EI Total, composite and subscales are shown in Table 8.4.

Table 8.4. Tolerance for Missing Items

	Scores cannot be calculated for any scale if more than...
EI Total Score	9 items are missing across the entire assessment
Composite Scales	3 items are missing on any given composite scale
Subscales	1 item is missing on any given subscale

Response Distribution

Although not in itself a measure of response validity, the way an individual responds across the entire assessment can reveal a great deal of information about his/her response style or tendency to respond in a given way. Examine the pie chart at the bottom of the Response Style Explained page in the coach's report. It shows the distribution of your client's responses across all items on the EQ-i 2.0. Look for tendencies to use one of the response options more heavily than

another, or for avoidance of a response option. For example, respondents who respond 3, Sometimes, to most of the items might be:

- responding in a very neutral way
- conservative
- in need of more information in order to be more definite in his/her responses
- unsure of themselves

Also look for patterns where the respondent avoids the middle response option and relies heavily on using 1, Never/Rarely, and 5, Always/Almost Always. Respondents who have a tendency to use the ends of the response scale may:

- describe themselves in an extreme way
- be very 'all or nothing' in their use of EI behaviors
- think in a very black or white manner

EQ 360 2.0

Getting to Know the Raters

You may have some questions about the raters who responded to the EQ 360 2.0. To get better acquainted with the raters and their response styles, start with the Rater Familiarity section of your EQ 360 2.0 Coach report. Here you will see how long the raters have known the participant (your client), how frequently they interact with the participant, and how well the raters know the participant. You will see the number of raters who provided responses in columns under the corresponding rater title.

Raters who report knowing the person better and for longer periods of time could have increased insight into the functioning of the participant; however, this is not to discount what is said by raters who have known the participant for less time. Less familiar raters may not be as biased by history, finding it easier to keep their focus of evalutation on the current context. This information should simply serve as a call of awareness in your interpretation and should help to inform the type of questions you may pose during the debrief process. Some questions you may ask are:

- How well do you know the raters chosen to complete your 360?
- Tell me about your process for selecting raters.
- Your raters have indicated that they have known you for a long time; would you agree? How would you describe these relationships during this time?
- What examples or interactions do you think your raters are using to rate your emotional intelligence? Are there specific events that you have been through together that could influence their ratings of you?

The next page is titled "Rater Response Style Explained". This page displays response information for the rater groups, much in the same way as your client's Response Style Explained Page. Any rater who responded in an overly negative, overly positive, incomplete, inconsistent or dishonest manner is indicated in the narrative on this page.

It is important to note that a 360 is not deemed invalid at the rater level. This information is simply provided to you so that you can be better acquainted with the raters and their styles of responding to the items on the EQ 360 2.0. For this reason you will not see any red flags on this page of the report.

Step 2: Interpret the Total EI and Composite Scale Scores

After assessing the validity of the EQ-i 2.0 profile, the next step is to examine the overarching scores: Total EI and the 5 Composite Scale scores. Although practitioners rarely coach to these broader scores, examining them before diving into the subscale level scores gives a high level view of the individual's emotional and social functioning.

EQ 360 2.0

It is important to follow the same interpretation steps shown here when using the EQ 360 2.0. Although you have a large amount of information to deal with from multiple sources, it is best to start by interpreting your client's self-rating first, using the steps presented here, then look at the results from the rater groups.

Interpretation of Total EI

The Total EI score is created by summing 118 of the 133 items (items on the PI, NI and Happiness scales as well as Item 133 are not included in the total score). This score gives a general indication of how emotionally intelligent the respondent is; it encapsulates how successful the individual is at perceiving and expressing oneself, developing and maintaining social relationships, coping with challenges, and using emotional information in an effective and meaningful way.

Remember, the Total EI score can mask high or low functioning in any given subscale, and therefore it is important to examine more closely the composite and subscale scores.

Interpretation of Composite Scale Scores

The 5 composite scales on the EQ-i 2.0 can be interpreted as buckets for organizing the 15 core subscales into similar categories. There is a logical progression as you move through the composite scales, as presented in the profile graph, starting with Self-Perception (SP), Self-Expression (SE), Interpersonal (IP), Decision Making (DM) and Stress Management (SM). Some characteristics typical of individuals with low and high scores on each of the composite scales are shown below. This information will be helpful in the interpretation of these scores.

Table 8.5. Composite Subscale Interpretation

Self-Perception Composite	
Lower Scores	**Higher Scores**
• May not be in touch with feelings • May lack inner strength and confidence • Emotions may elude or confuse them • May not understand emotional landscape • May not make good use of abilities	• Feels good about oneself • Feels positive about life • In touch with own emotions • Recognizes and predicts emotions • Detects nuances between different emotions
Having a solid understanding of oneself, one's emotions and one's inner life allows one to better express thoughts and feelings.	

Self-Expression Composite	
Lower Scores	**Higher Scores**
• Struggles to express own thoughts and feelings • May be emotionally dependent • May find it hard to describe how one feels • Expression of emotion may not be constructive • May refrain from sharing thoughts and beliefs	• Free from emotional dependency on others • Constructively expresses thoughts and emotions • Can describe and articulate how one feels • Openly and confidently expresses oneself • Self-directed
Being able to openly and honestly express one's true thoughts and feelings enables one to have healthy relationships and interactions.	
Interpersonal Composite	
Lower Scores	**Higher Scores**
• May lack appropriate social skills; withdrawn • May struggle to understand or relate to others • May not see how own emotions affect others • Relationships may be of lower quality or depth • May not be sensitive to the feelings of others	• Seeks and maintains high-caliber relationships • Sensitive to and cares for the needs of others • Can predict how own emotions affect others • Sociable, easy to approach • Feels a responsibility to contribute to society, one's social group or team
A healthy network of relationships gives one greater resources from which to gather information and process it accordingly and seek feedback in order to arrive at optimal solutions.	
Decision Making Composite	
Lower Scores	**Higher Scores**
• May not use emotional information effectively • Emotions may hinder decision making • May fall victim to rash behaviors/decisions • Could struggle to remain objective • May be derailed or biased by emotions	• Leverages emotional information to make decisions • Seeks and maintains high-caliber relationships • Grounded; able to objectively size up a situation • Can separate emotion-driven assumptions from fact • Resists or delays impulses to act; methodical
Feeling competent, calm and grounded in one's ability to use emotional information to make decisions renders one better equipped to deal with everyday stressors, without being derailed by emotions.	
Stress Management Composite	
Lower Scores	**Higher Scores**
• Struggle when faced with stress or change • May often feel anxious or stressed; less hopeful and resilient • May be rooted in tradition; resistant to change • Pessimistic about the future	• Cope well with the emotions associated with change and stress • Resilient; draws from multiple coping strategies; calm and works well under pressure • Adaptive; view change as a positive thing • Optimistic about the future
Resilience in adversity and an arsenal of coping strategies heightens feelings of self-security, confidence and the understanding of oneself and one's strengths.	

Composite scales allow you to dig a little deeper into the results than the Total EI scores, but like Total EI, composite scales can still mask a high or low score on a given subscale. Therefore, focusing too much at the composite scale level may mean losing important information about the respondent's performance on specific subscales.

Step 3: Interpret the Subscale Scores

The next level of interpretation is at the subscale level. While the Composite scale scores give a general indication of coping ability and present functioning, one can pinpoint specific strengths and weaknesses (which should be further explored through the debrief process) by examining the subscale scores. Subscales are the finest level of detail that you can see on the Profile Graph without getting into individual item responses (see Step 5, Interpret Item Responses).

Some characteristics to help you interpret each subscale score are shown in Table 8.6. Remember that the characteristics shown here are generalizations for lower and higher scores and are not a finite description of your client's score. Take care to verify the characteristics listed here by examining the item level results after you have gained some comfort with the subscale scores and patterns on the Profile Graph.

Dealing with Extreme EI Profiles

Consistently high or low scores across all subscales can be due to a response style that is overly positive or overly negative. Check the Positive and Negative Impression indices on the Response Style Explained page in the Coach's report to determine if there are any validity concerns. Also, if all scores are very low, it is a good practice to confirm that the EQ-i 2.0 was taken in a language that the client understood. If neither of the impression indexes are flagged, and the language was appropriate, you may want to return to the profile graph and look for areas of relative strength or weakness. Even subscales that vary by a couple of points from one another may be interesting enough to warrant further exploration with the client.

High scoring subscales often need to be balanced by other subscales so that these behaviors are not overused. For example, one can imagine that having extremely high Assertiveness without the balancing effect of high Empathy could lead to an individual being perceived as aggressive, pushy or hostile. It is important to look for balance within your client's profile, which is the next step in the interpretation sequence.

Table 8.6. Subscale Interpretation

	Lower Scores (<90)	Higher Scores (>110)
Self-Regard *Respecting oneself; confidence*	• Uncertain of one's abilities • Lower self-confidence • Lower motivation to achieve potential	• Respects oneself, and believes in one's own talents and strengths • Well developed sense of identity • Driven to achieve fullest potential
Self-Actualization *Pursuit of meaning; self-improvement*	• May not make good use of strengths • Focus is more on day to day tasks vs strategic, big picture plans • May set lower personal goals	• Appears to act with a greater purpose or plan • On a quest of continual learning • Self-motivated; sets inspiring goals
Emotional Self-Awareness *Understanding own emotions*	• May not know why thoughts or feelings occur • May struggle to label or define what one is feeling • May appear detached from experiencing emotions	• Can accurately label and describe one's emotions • Understands slight nuances between emotions • Conscious of the impact emotions have on performance; gathers information from emotions
Emotional Expression *Constructive expression of emotions*	• Uncomfortable expressing oneself through words, facial expressions or body language • May appear withdrawn or uneasy in emotional situations • Uses limited emotional vocabulary to express oneself	• Comfortable expressing most if not all emotions • Understands the benefits of emotional expression • Uses a large emotional vocabulary to express oneself
Assertiveness *Communicating feelings and beliefs; non-offensive*	• Passive, may keep thoughts and opinions to oneself • May appear to be a team player although likely feels as if one's voice is never heard • May appear withdrawn or unable to articulate needs	• Expresses thoughts and ideas without offending others • Firm and direct when necessary • Views his or her own rights and the rights of others as sacred; stands up for rights when necessary • Pulls on emotions and convictions to take a definite stance
Independence *Self-directed; free from emotional dependency*	• More of a follower than a leader • Needs reassurance and support from others • Relies heavily on others to make decisions; may skirt responsibility • Prefers direction on how to do one's job	• Makes decisions on one's own; emotionally independent from others • Works without direction or reassurance from others • Directive, decisive and accountable
Interpersonal Relationships *Mutually satisfying relationships*	• Defensive, skeptical or closed to other people • May not build bonds that include mutual give and take • May be missing a network or resources to properly cope with demands • Relationships may lack depth, trust or compassion	• Invested in one's relationships; maintains a healthy level of trust and compassion • Sociable and generally fun to be with • Builds authentic relationships and shares relevant information • Has a network to draw on for support when faced with challenges
Empathy *Understanding, appreciating how others feel*	• May struggle to understand how others feel • May not recognize the impact one's behavior has on others • Insensitive to the needs of others • Misreads/misinterprets others' feelings	• Aware of, and can appreciate the feelings of others • Caring; compassionate • Takes others into consideration before acting • Reads people well
Social Responsibility *Social consciousness; helpful*	• More an individualist than a collectivist • More competitive than collaborative • Cut off from social groups/issues • May entertain antisocial attitudes	• Interpersonally sensitive • Co-operative; contributing and concerned about the welfare of others • Upholds social rules/norms • Concern for the greater good/team/community
Problem Solving *Find solutions when emotions are involved*	• May be anxious or unable to get past the emotions involved in a problem • May not draw information from emotions in order to solve problems • Overwhelmed with the responsibility of making a decision • Easily distracted by emotions	• Understands how to use emotions to solve problems • Maintains a clear focus on the problem at hand • Chooses the best solution from among many options • Focused demeanor
Reality Testing *Objective; see things as they really are*	• May not validate thoughts/emotions against objective data • Subjective; easily biased by emotions • Sets unrealistic goals • May see things the way one wishes they were and not what actually exists	• Grounded; tuned-in to the situation at hand • Objective • Verifies one's thoughts/emotions against other data • Makes sensible decisions; sets realistic goals
Impulse Control *Resist or delay impulse to act*	• Impulsive, impatient • Overactive • Uses an act now, think later approach to making decisions • May respond in unpredictable ways to own emotions	• Composed; calculative • Deliberate; surveys a situation before acting • Patient and calm; predictable behavior • Avoids rash decision making • Resists the emotional pressure to act
Flexibility *Adapting emotions, thoughts and behaviors*	• Values tradition; uneasy with change • Rigidity in thinking and behavior • May be against change in general, or change in oneself • May be unable to deal with the emotions associated with change	• Open to change; views change as refreshing and necessary • Compliant attitude; adaptable • Rolls with the punches • May be bored with the status quo

Table 8.6. Subscale Interpretation *(Continued)*

	Lower Scores (<90)	Higher Scores (>110)
Stress Tolerance *Coping with stressful situations*	• Emotions may get in the way of coping with stress • Less tolerant of stress • May experience tension, anxiety, poor concentration, physiological symptoms or feelings of hopelessness when faced with stress	• Uses a variety of coping strategies to deal with stress • Stays calm under pressure • Manages emotions under stress • Resilient and able to remain composed when times get tough
Optimism *Positive attitude and outlook on life*	• May hold cynical or negative views of the world • Expects and plans for the worst • Sets goals that are likely to be conservative • May hold defeatist attitudes; less resilient in the face of adversity	• Views the world in a positive light • Believes in oneself and others; sees the good in most things • Inspiring • Can see the light at the end of the tunnel and perseveres
Happiness *Content; enjoys life*	• May currently be unhappy or not excited about one's life • Has difficulty enjoying life • Withdrawn from social situations or friends • Dispirited; worries a lot • EI strengths in other areas may be dampened by one's unhappiness; others are unlikely to see strengths through a cloak of dissatisfaction	• Satisfied with life • Pleasant to be around • Spirited and enthusiastic about life in general • Displays a healthy level of well-being • EI strengths in other areas may be amplified by one's happiness and satisfaction with life.

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Is Higher Always Better?

Not necessarily. Although the EQ-i 2.0 is designed to measure a linear construct (i.e., higher scores indicate greater emotional intelligence), there are occasions when a high EI skill may be over-relied upon and used in inappropriate situations. For example, if you are a debt collector, too much empathy may not be a good thing. A highly empathic debt collector may find him- or herself unable to make tough decisions that affect the lives of clients, making it hard to reach collection targets. High levels of Interpersonal Relationships skill may enhance one's social life in university, but it can also be detrimental to grades if it is not properly managed.

Step 4: Balancing EI Subscales

Once you have an overall sense of where your client's subscale scores lie, you can begin to investigate subscales that may be out of balance with each other. Balance is important within the EI profile because subscales that are higher can be tempered by other related subscales, and subscales that are lower can be bolstered by related subscales. Look for any subscales that are significantly higher or lower than others. A good rule of thumb to gauge whether a subscale is significantly different is to use the *rule of 10*. That is, 10 points between any two subscales indicates that the client is likely to exhibit one set of behaviors significantly more often than the other set. Two examples are shown below:

Example of Imbalance (At Least 10 Points Difference)

1. Flexibility (126) and Impulse Control (90)

   Eric receives very different scores for Flexibility and Impulse Control; 36 points difference to be exact. This difference would suggest that Eric might be highly adaptive but this coupled with a tendency to be impulsive (low Impulse Control score) might render him wishy-washy, scattered and non-committal. Eric would be in better balance if he was to strengthen his ability to control his impulses to act, thereby tempering his flexible nature.

2. Assertiveness (120) and Interpersonal Relationships (127)

   Meg receives similar high scores on both the Assertiveness and Interpersonal Relationships subscales, presenting a healthy balance between the way she expresses her thoughts and feelings and the emphasis she places on maintaining relationships. Although Meg will often be seen asserting herself and her thoughts, she is unlikely to do so at the expense of others due to the amount of compassion and consideration she has for her relationships. Meg should watch that these subscales remain in balance throughout her EI development efforts.

Pages 5-9 of the Coach's section display your client's results on balancing subscales[2]. Each subscale has three balancing subscales that are most critical to balance. Balancing subscales were chosen based on the relationship with the subscale of interest and whether the relationship is coachable and practical for clients to grasp.

In other words, a balancing subscale was not simply chosen because it had the highest correlation with the scale of interest, but it also had to make practical sense from a coaching perspective. For example, Assertiveness and Empathy are not strongly correlated, but this is a very logical and practical developmental area for someone who does not have balance between these subscales.

The three subscales chosen as balancers are shown in Table 8.5. Keep in mind that these are not the only relationships that are important for achieving balance within an EI profile. You may wish to explore any areas of balance or imbalance in your client's report and the interconnectedness between all 15 subscales allows you to do just that.

[2] The Balancing EI section is optional and can be turned on or off in the Coach and Client reports. The Balancing EI section is also optional in the EQ 360 2.0 Coach and Cient reports and will appear in the same manner as in the EQ-i 2.0 reports.

Table 8.7. Balancing Your EI, the Relationships Between Scales

Self-Perception	Self-Expression	Interpersonal	Decision Making	Stress Management
Self- Regard • Self-Actualization • Problem Solving • Reality Testing	Emotional Expression • Interpersonal Relationships • Assertiveness • Empathy	Interpersonal Relationships • Self-Actualization • Problem Solving • Independence	Problem Solving • Flexibility • Reality Testing • Emotional Self-Awareness	Flexibility • Problem Solving • Independence • Impulse Control
Emotional Self-Awareness • Reality Testing • Emotional Expression • Stress Tolerance	Assertiveness • Interpersonal Relationships • Emotional Self-Awareness • Empathy	Empathy • Emotional Self-Awareness • Reality Testing • Emotional Expression	Reality Testing • Emotional Self-Awareness • Self-Regard • Problem Solving	Stress Tolerance • Problem Solving • Flexibility • Interpersonal Relationships
Self-Actualization • Self-Regard • Optimism • Reality Testing	Independence • Problem Solving • Emotional Self-Awareness • Interpersonal Relationships	Social Responsibility • Self-Actualization • Interpersonal Relationships • Empathy	Impulse Control • Flexibility • Stress Tolerance • Assertiveness	Optimism • Self-Regard • Interpersonal Relationships • Reality Testing

EQ 360 2.0

If you are using the EQ 360 2.0, now is the time to examine the feedback received from the multiple rater groups and how their perceptions support or differ from your client's perception of his EI capabilities. First, you may want to work through the previous five steps with regard to each rater group, looking for areas of strength and weakness as perceived by each group. However, the real benefit of the EQ 360 2.0, is in comparing the results from one rater group to another.

Profile Patterns

When interpreting the EQ 360 2.0, it is helpful to look at the similarity between raters and your client as well as the source of the biggest difference between raters and your client. This section describes the Closest Agreement and Biggest Gap sections as they appear in the Client report.

Closest Agreement

Consensus between the self scores and rater group scores indicates that self-perceptions about one's EI strengths and weaknesses are accurate, or at the very least, observed by others in the same way. Subscales where scores are less than 10 points apart between self and raters (e.g., Empathy Self score = 100, Empathy Peers score = 97 and Empathy Manager score = 104) are considered in the 360 report to be areas of close agreement. Where there is agreement on an area of weakness (i.e., low scores across self and rater groups on a particular scale), this provides a highly informed basis for development of this EI skill. Or, if using a strengths-based coaching approach, you may want to guide your client to further leverage strengths where both the client and the client's raters have similar high-range scores.

Biggest Gap

Generally speaking, when scores on an EQ 360 2.0 subscale are more than 10 points apart (e.g., Empathy Self Score = 90, Empathy Peers Score = 111 and Empathy Manager Score = 79), there is a significant gap between how your client perceives her EI skills and how the same skills are observed by others. When rater groups provide higher scores than does your client, this is an indication that your client's emotional and social functioning is actually more effective than she thinks is the case, meaning your client could be underestimating her EI skills. When rater groups provide lower scores than your client does, this is an indication that your client's behavior typically misrepresents their EI skills, meaning your client could be overestimating their EI skills.

?

What does Agreement look like in the report?

You will see agreement represented on two separate graphs in the EQ 360 2.0 Coach and Client reports: the Profile Gap Analysis and the How You and Your Raters Responded Summary graph. The Profile Gap Analysis shows each subscale plotted based on the level of agreement between self and rater group scores, with subscales appearing on the right of the graph having close agreement- your client sees herself in much the same way that her raters do. Agreement on the Summary graph is displayed when rater symbols overlap or appear next to each other. For each subscale, a range line shows the spread between the lowest and highest score given by your raters. You can easily scan the graph for agreement, look for short range lines where rater symbols are close together to indicate consistency between how your client sees herself and how she is perceived by others.

?

What does a Gap look like in the report?

The same two graphs that show agreement also show where there are gaps between your client's self-rating and those provided by the raters. On the Profile Gap Analysis page, subscales appearing on the left of the graph show gaps, or less agreement, between your client and his raters. Subscales appearing here indicate awareness gaps, meaning that there are differences between how your client sees himself and how others see him. On the Summary Graph, gaps are shown when rater group symbols are 10 points or more from each other. Longer range lines indicate more disagreement between raters in the way they observe your client's EI skills.

Step 5: Interpret Item Responses

After you have made note of any observations at the subscale level, the last level of analysis comes from the items themselves. The Coach's report displays your client's responses to every item on the EQ-i 2.0. Examining items may unearth specific concerns or areas of strength that are not clear at the subscale score level. Knowledge of item responses can:

- serve as a basis for discussion and further probing during the feedback process
- clarify discrepancies or surprises when the client doubts the subscale score
- inform specific development goals or steps to complete in your client's action plan

Item level responses **should not be**:

- the sole basis for forming a conclusion about the client
- used to diagnose emotional problems
- examined in isolation from other items or the participant's response style

Step 6: Compare EQ-i 2.0 Results to Findings from Additional Sources of Information

In order to augment findings obtained with the EQ-i 2.0, wherever possible consultants should use additional sources of information to help paint a clearer picture of the client's emotional and social functioning. These additional sources might include observations, behavioral interviews, past discussions with the client, work performance reports/feedbacks, academic records or other psychological assessments and inventories. For more information on combining emotional intelligence and personality type, refer to Introduction to Type and Emotional Intelligence (Pearman, 2002). If you are using other EI assessments in conjunction with the EQ-i 2.0 (e.g., MSCEIT), refer to Emotional Intelligence in Action (Hughes, Patterson, & Terrell, 2005).

EQ 360 2.0

The comment sections in your EQ 360 2.0 Coach report can be rich sources of information to supplement the abundance of numerical scores presented to your client. You may find that raters have provided examples of higher and lower emotional functioning, based on their interactions with your client. Use comments to validate your client's 360 results and to inform the feedback process, but refrain from using them to form diagnostic conclusions about your client.

Obtaining supplemental data is especially important when the EQ-i 2.0 is being used to make selection and clinical decisions. When these additional sources of information are used, a richer, more comprehensive, and more powerful set of findings can be created for discussion with your client through the debrief process.

Step 7: Summarize Your Findings, and Create Working Hypotheses and Development Strategies

Providing a client with a copy of their EQ-i 2.0 report does not constitute appropriate feedback, nor does simply listing the client's high and low scores from the profile graph. Although the shape of your EQ-i 2.0 feedback can take any form, it is your responsibility not only to share test results but also to share your interpretations of these results in language that is easy for your client to understand (APA, 1999).

Your feedback should include a discussion about your client's overall degree of emotional intelligence and any notable strong and weak areas. Within this discussion, present working hypotheses about what the results might mean for your client and his or her immediate situation. A working hypothesis is a non-definitive and non-diagnostic statement about a possible interpretation of your findings and can be used to initiate discussion about how a particular result applies to your client's life. The term "working" is used because as the discussion progresses, you will revise your hypotheses, as your client reveals more information or examples of how EI skills manifest themselves in the workplace, at home or in relationships, for example.

Example of a Working Hypothesis

> "You might run into challenges with an imbalance between your Empathy and Assertiveness results. How do you see these subscales working for you? Do they ever work against you?"

Example of a Definitive Hypothesis

> "Your Empathy score is significantly lower than your Assertiveness score which indicates that you are argumentative or insistent at work. Do you agree?"

Your objective is to confirm throughout the debrief process which of your working hypotheses are relevant and valid to your client. Be prepared to gather additional information on your hypotheses as you go, and reject, accept or throw out hypotheses as your client provides more details.

Based on the nature and degree of the lowest and highest subscale scores or any other subscale of interest to your client, you should be prepared to discuss development strategies and

possible next steps to attain improvement in EI skills. Several development strategies are outlined in the client's report, and your own professional recommendations can be used for emotional skills improvement. In order to obtain the most value from the EQ-i 2.0, the debrief process should end with next steps for the client, otherwise any findings and revelations will likely remain as personal insight but not progress into permanent personal growth.

EQ 360 2.0

Working hypotheses for an EQ 360 2.0 interpretation should examine areas of both agreement and disconnect among your client's various rater groups. Presented below are some working hypotheses to get you started in interpreting your client's EQ 360 2.0 results:

Self scores are significantly lower than rater group scores.

Some individuals underestimate their ability to understand and express themselves. This tendency could be based on low self-awareness, low self-esteem, a lack of self-confidence, a different definition of a particular subscale, or higher expectations of what successful demonstration of that particular subscale would look like.

Rater scores are significantly lower than self scores.

Some individuals may overestimate their abilities, skills and performance when it comes to drawing on EI skills at work. This could be due to a misunderstanding of what success looks like, low self-awareness, egocentric needs, narcissism or an inability to view oneself as one really is (Reality Testing).

The ratings of one rater group differ substantially from the others.

Instances where scores from one rater group diverge in a notable way from the others may indicate that the participant behaves, and possibly performs, in a significantly different manner when interacting with individuals in that rater group. For example, if manager ratings are significantly lower for Assertivenes, when self and all other rater groups have provided a higher score, this may indicate that your client is less assertive when interacting with her manager, but is able to work assertively with colleagues and direct reports. In such cases it is important to explore the extent to which, and why, his/her performance is more or less effective within that particular work relationship. Also, consider the hypothesis that your client is consistent in their behavior, but that the rater group is either more or less familiar with your client's performance compared to the other rater groups.

CHAPTER 9

Giving Feedback

This chapter is designed to complement chapter 8: Understanding the Results. Recommendations and guidelines for providing feedback in personal coaching, professional development, group settings, and selection are provided. It is not the goal of this chapter to be all-encompassing; delivering meaningful and effective feedback must begin with a solid understanding of the EQ-i® 2.0 and EQ 360® 2.0 coupled with effective coaching and interpersonal skills. This chapter will address feedback best practices as they relate to the EQ-i 2.0 and EQ 360 2.0; the importance of establishing meaningful feedback goals; and the responsibilities of the coach, consultant, counselor or HR professional in the feedback process.

Goals of the Feedback Process

The feedback process is your opportunity to engage your client, offering the opportunity to discuss his or her results with you. It is strongly encouraged that the feedback process consists of a one-on-one conversation so that the client can feel comfortable and will be open to working through the rich and plentiful information that is presented in the EQ-i 2.0 and EQ 360 2.0. In the event the consultant should engage a group of EQ-i 2.0 users, group feedback should include a discussion of the group's overall results, and individual results should not be discussed while in the group session. The goals of the feedback session, whether in a group or one-on-one, should include the following:

1. Ensure the client has gained an accurate understanding of his or her EQ-i 2.0 results. If the EQ 360 2.0 is applicable, it is equally important that the coach and client have worked sufficiently through the self portion of the results prior to proceeding to the rater information.
2. Ensure the focus is on opportunity, and not on good or bad scores. Where necessary, the consultant should help the client move away from judgment and negative reactions to embrace the opportunities in leveraging their strengths and developing underutilized or underdeveloped skills.
3. The EQ-i 2.0 and EQ 360 2.0 feedback process is as much about creating self-awareness as it is about promoting change. We must remember that the information provided by EQ-i 2.0 is merely a reflection of the client's self perception. As a result, it is the coach's role to help his or her client work through any perceived obstacles that may prevent the client from embracing the feedback process.
4. Prior to concluding the feedback process, the coach should work with the client to develop an Action Plan or next steps. Although the feedback process centers on gaining awareness, sustained change cannot occur without deliberate, conscious effort. The coach should encourage the client to establish two to three meaningful development goals that are tied to the EQ-i 2.0. Each goal should be specific and outline steps the client will need to take to reach his or her development objectives.

Identify Your Role

During the feedback preparation process, it is important for you to consider your client's profile in the context of other information you have about him or her (e.g., other assessment results, interviews, performance reviews). Combining this information can help you generate relevant and meaningful questions for the feedback session, ensuring the client receives an optimal experience.

You can adopt any one of a number of styles for delivering feedback. This choice will reflect your comfort with the assessment, knowledge of the client, the assessment's results, and the goals and objectives of the feedback process. The EQ-i 2.0 and EQ 360 2.0 are compatible with a variety of coaching styles. The following examples are listed as possibilities for providing feedback and have been shown to be effective. For a more detailed explanation and for implementation strategies, please refer to chapter 10, Coaching Fundamentals.

1. **The EQ-i 2.0 Model Approach.** Perhaps the most straightforward approach to feedback, the EQ-i 2.0 Model Approach, follows the hierarchical model of the EQ-i 2.0 with discussions of the Total Score, followed by each composite scale, and then each of the subscales. Generally this approach is effective and, for the novice user, provides a simple and cohesive structure for feedback.
2. **Client-Centered Approach:** An effective alternative to the EQ-i 2.0 Model Approach is to focus on the client's strengths. The client-centered approach is particularly effective in situations where unexpectedly low scores are reported. Emphasizing strengths can take the sting out of

lower scores while helping to keep the client open to new ideas and possibilities. Establishing early successes may help create a level of comfort that promotes openness and allows the feedback process to progress to the areas with the greatest opportunity for the client's development.

3. **Narrative Approach.** The Narrative Approach, while highly effective, requires an astute understanding of the EQ-i 2.0 and of the implications of the interconnectedness among subscales. It often helps to begin by asking the client to provide two or three relevant examples describing recent successes or difficulties, and to explain how those situations were handled. The role of the coach during this type of feedback is to draw explicit connections between the results of the EQ-i 2.0 and the experiences of the client. This approach can often feel unstructured; the onus rests on the consultant to connect each example back to the client's results. Some, especially those high in Impulse Control and low in Flexibility, may not appreciate the organic nature of this approach.

EQ 360 2.0

Providing feedback on the EQ 360 2.0 can use any one of these three approaches, particularly because the 360 debrief process usually starts with self results and then moves to the results obtained from various rater groups. Once your client is examining their multi-rater results, you may find the narrative approach helpful; connecting real examples of why the rater may be providing a certain rating of your client's EI skills can open up a rich discussion of developmental areas that were otherwise hidden to your client.

Guidelines for Best Practice

It is not only an ethical practice but also a best practice to provide your client with feedback on the EQ-i 2.0 or EQ 360 2.0. When using assessments, professionals who spent more time conducting feedback sessions were more likely to hear positive, collaborative dialogue from their clients (Smith et al., 2007). Additionally, positive gains in your client's self-esteem are likely to result from providing him or her with feedback (Allen et al., 2003). To ensure that all clients are exposed to an ethical and effective feedback process, the following best practices are strongly recommended. While these guidelines address the phases of preparation and evaluation independently, success is best achieved when they are integrated.

Prior to Giving Feedback

1. Timing: Delivering the EQ-i 2.0 or EQ 360 2.0 Report

The delivery of the EQ-i 2.0 or EQ 360 2.0 report to your client is a crucial first step in the feedback process, and when timed correctly can impact the openness or responsiveness of your client during feedback. When presented with the opportunity to find out how well or poorly they have scored, many clients will quickly sift through their results and direct their attention to the most intriguing of outcomes: often their lowest scores. In the case of a 360 report, clients tend to skip their self results and jump right to what people said about them. Clients who are more self-aware will accept and even expect their results; however, for others this may present an immediate shock. Because we cannot accurately predict how clients will react, it is highly recommended that the coach disseminate a report no more than 24 hours prior to the scheduled feedback session and preferably 2 to 3 hours prior.

In most cases, a 2 to 3 hour window should be sufficient to allow the client time to read through the report and begin to reflect on what the results might mean. Should too much time pass, however, thoughts of 'what might be' become more formalized and concrete. The longer a client has to ruminate over his or her results, the more difficult it is for them to be open and receptive to new definitions or meanings of subscales, development ideas, and strategies.

The delivery of results to the client can occur in any number of ways. In most cases electronic delivery by e-mail is ideal; however, the coach must ensure delivery is from a secure location and to the correct e-mail address. Client anonymity and confidentiality are of the utmost importance, and therefore great care must be taken during the delivery process (APA Standard 5.13, 1999).

EQ 360 2.0

How long should an EQ 360 2.0 feedback session take?

It is recommended that you spend about 90 minutes with each participant to review his or her self-ratings and then discuss rater results in the same session. However, if you wish to break up the feedback over several sessions, the recommended timing is as follows:

	Recommended Feedback Time
One Session	
If combining EQ-i 2.0 and EQ 360 2.0 debrief	90 minutes
If providing only EQ 360 2.0 debrief	60 minutes
Several Sessions	
First session: introduction of report, EQ-i 2.0 debrief of self results	60 minutes
Second Session: EQ 360 2.0 debrief	60 minutes
Third session (and subsequent sessions): EQ 360 2.0 deeper focus (biggest gap/ agreement, balancing EI sections)	60 minutes per area of focus

Please refer to the Coach's Guide to a Debrief Session section in your EQ 360 2.0 Feedback Report for specific suggestions for debriefing multirater reports.

2. Preparing for Feedback

To help you prepare for a feedback session, you should attend to the following areas of the coach's and client's reports.

Coach Report

1. Identify if there are validity concerns that need to be addressed.
    a. Inconsistency Index
    b. Positive Impression
    c. Negative Impression
    d. Omitted items
2. Check the response style of the client.
    a. Did the client primarily select 3s or 1s and 5s?
3. Examine the scores for each subscale
    a. Identify scores below 90 and above 110.
    b. Look for a well balanced profile. Investigate
        i. Peaks and valleys in scores (Balancing EI)
        ii. Consistently high scores
        iii. Consistently low scores

Client Report

4. Dig into Implications and Strategies for Action.
    a. Emotional Implications
    b. Social and Behavioral Implications
    c. Strategies for Action
5. Take a closer look.
    a. Self-Awareness
    b. Self-Management
    c. Emotion Management
    d. Effective Relationships
    e. Personal and Interpersonal Effectiveness

The model for applying the EQ-i 2.0 (Figure 9.1) provides a framework with which you can direct your efforts during the initial stages of the feedback process, increasing the probability of a meaningful exchange with your client. Beginning with Self-Awareness (Step 1), emphasis is placed on the perception of the self. That is, before one can begin to truly embrace well-being and optimal performance, one must possess an established sense of self. During the interpretation stage and feedback process, investigate the client's frequency and intensity of thoughts, feelings, and behaviors that reflect an awareness of inner feelings, an understanding of the source of these feelings, and a healthy respect of self. In the event a client appears to be lacking in these inner processes, coaching efforts can be directed here; otherwise, you can proceed to examining the progress of Step 2, Self-Management.

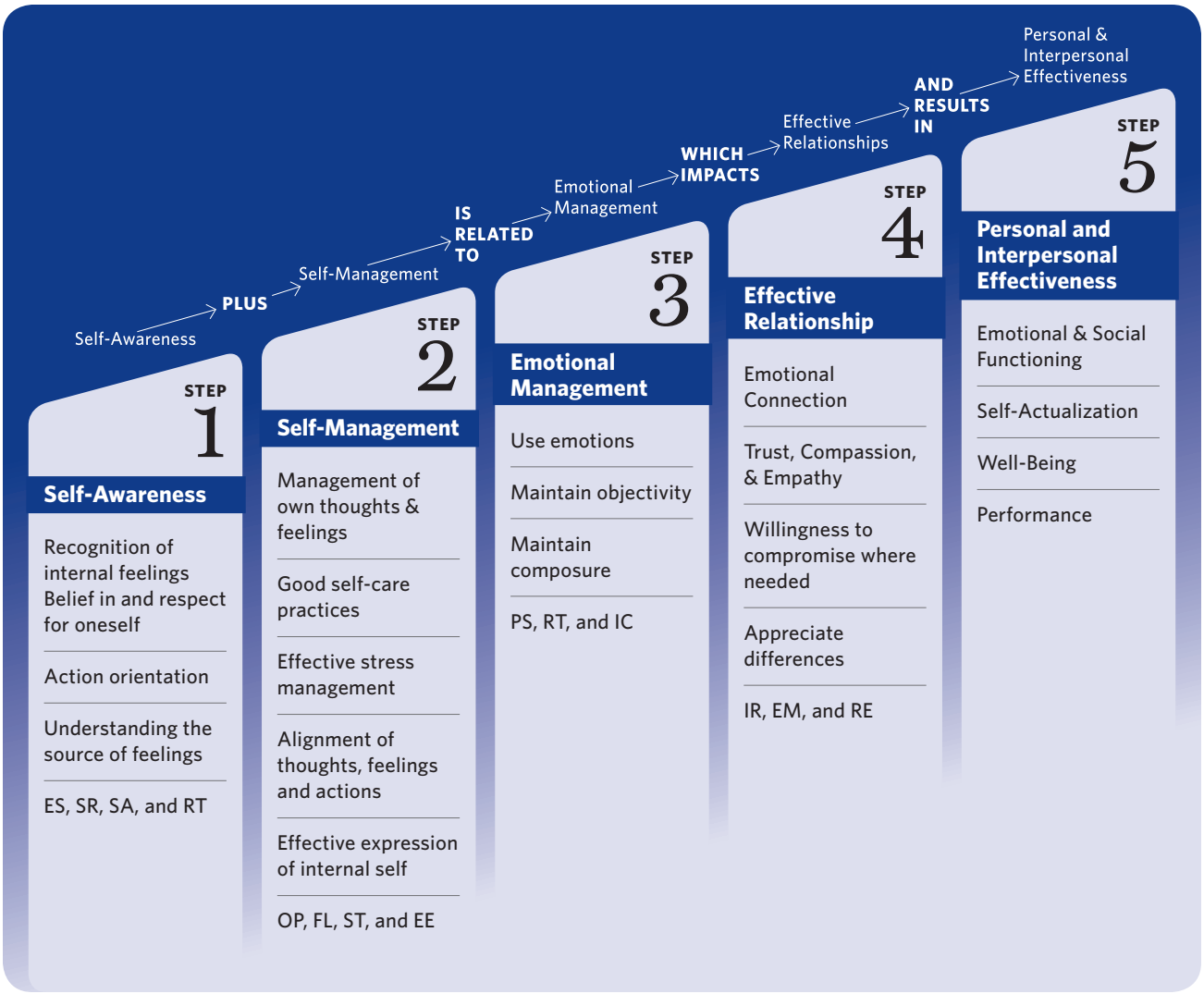
The goal of the Self-Management stage is to assess the coping skills of the client. Productivity and success are often defined by how well individuals perform under pressure, or their ability to manage and cope with daily demands. Without the proper skills in place, problem solving and the effective use of emotional information is difficult. Step 3, Emotional Management, addresses the components of the Decision Making Composite, which provide the foundation for processing and applying emotional information. The implication here is twofold. Although the effective application of emotional information—coupled with the ability to remain composed and objective—can positively impact decision-speed and accuracy, it may also provide a foundation on which relationships are formed. At the core of Effective Relationships (Step 4) are trust, compassion, empathy, and willingness to compromise. An individual who struggles to delay impulses, remain objective, and work through setbacks will have difficulty sustaining meaningful relationships.

A common asset among the successful, content, and happy is a meaningful social network characterized by effective relationships. Step 4, Effective Relationships, addresses the breadth and depth of one's interpersonal connectedness. Should a client lack such relationships, or would simply benefit from extending that network, Step 4 provides a starting point.

Step 5, Personal and Interpersonal Effectiveness, is the culmination of the four preceding stages, but is most proximal to Effective Relationships. Simply put, the positive outcomes of social support like increased psychological adjustment, employing adaptive coping strategies, promoting resilience and contributing to physical health and survival, are invaluable (Taylor, 2011). This social support, however, does not flow from any relationship, but rather from relationships built on a solid foundation of the elements underpinning Steps 1 through 4 (e.g., trust, compassion and empathy).

Although the model is presented in a linear format, it is possible that you will encounter clients who possess healthier skills in the latter steps than in the earlier steps. For example, your client may have well developed relationships and draws on these social resources to cope with stress, but he lacks self-awareness (Step 1). In this case, your client may benefit from self-awareness training to better leverage his internal feelings to cope with life's daily demands. The model is not meant to be a panacea or golden rule for development, but is designed to present a pragmatic approach for considering the developmental processes that may provide a client with the greatest reward for his or her investment in developing EI skills.

Figure 9.1. A working model for application of the EQ-i 2.0



During the Feedback Process

There are a number of critical elements to attend to when providing feedback. Generating comprehensive awareness can increase motivation and overall engagement, because people are more likely to actively participate in a process when they perceive it to be beneficial and personal (Bandura, 1977). Moreover, attention should be paid to creating positive expectations. This can be achieved by addressing the opportunity for enhancing Emotional Intelligence through various strategies. Since it is necessary that both the client's strengths and weaknesses be addressed during the feedback process, it is important to create an environment that the client perceives as comfortable and supportive. This can be achieved by developing a rapport grounded in an empathic and genuine relationship between you and the client. In such an environment, resistance and defensiveness can be overcome, thereby allowing for the client's full engagement.

It is important that clients understand why the assessment process has been embarked upon and what they can expect throughout the feedback process (including session duration) and beyond. You should be clear about what will happen with the results of the assessment, as well as with your notes; assurance of confidentiality is vital. To ensure an optimal feedback experience, the consultant should attempt to integrate the following steps.

1. Set the Stage
    a. Introduce yourself.
    b. Verify that the client understands the purpose of taking the EQ-i 2.0 or EQ 360 2.0.
    c. Discuss what will happen with the results and your notes.
    d. Outline what will happen during the feedback process and how long the feedback session will take.
    e. Assure confidentiality.

2. Build Rapport
    a. Asking specific questions may be useful for establishing rapport.
        i. Did you have any trouble taking the EQ-i 2.0?
        ii. Do you have any questions?
        iii. Have you had a chance to look over your results/report? If not, allow some time for your client to review their report.
        iv. Is there anything that is particularly surprising about your results?
        v. Are there any areas that you feel might be questionable?
    b. Address any burning questions first in order for the respondent to concentrate on the remainder of the feedback session.

3. Ensure Understanding
    a. Discuss what the report contains.
    b. Describe the EQ-i 2.0 Model of Emotional Intelligence. Ensure the client is comfortable with the following concepts:
        i. Total EI,
        ii. The 5 composite areas,
        iii. The 15 subscales,
        iv. The Well-Being Indicator.
    c. Clarify what emotional intelligence is and what it is not.
    d. Address why and how emotional intelligence can enhance personal well-being, performance, and leadership success (if applicable).
    e. Address elevated PI, NI, or Inconsistency scores and response distribution. Explore motivation for answering in a given way.
    f. Explain the scores relative to the general population.
    g. Walk the client through the Profile Graph. Pay particular attention to reactions (e.g., comments and changes in body language).
    h. Drawing on preferred coaching style, work through client results.
    i. Draw connections to other subscales (e.g., high scores, low scores, opportunities, and subscales that help to balance or temper each other).

4. Address Results
    a. If applicable, discuss the implication of scores above 110 or below 90.
    b. Emphasize the importance of a balanced profile.

5. Action Plan
    a. Establish 2 or 3 meaningful takeaways from the feedback process.
    b. Define 1 or 2 meaningful and relevant goals for each takeaway.
    c. Establish a timeframe and checkpoint for progress.
    d. Identify how positive change will be rewarded.
    e. Plan for setbacks and establish contingency plans.

EQ 360 2.0 Feedback

The EQ-i 2.0 feedback process can be invaluable; receiving 360 degree feedback can be a further enlightening and reassuring process. Nevertheless, in some cases the results may be surprising and even uncomfortable for your client.

The above-outlined best practices apply to both users of the EQ-i 2.0 and EQ 360 2.0. The EQ 360 2.0 user, however, must be aware of several obstacles that may, if not sensitively attended to, interfere with an effective feedback process. The opportunity to compare self results against the results of raters is an effective way to gather otherwise unavailable information about your client. This can result in tremendous developmental gains, provided the consultant adheres to the above EQ-i 2.0 best practices and is sensitive to the fact that it is common for 360 recipients to be skeptical of results that do not align with their self-evaluation. Consequently, the 360 coach should be aware of the following defense mechanisms commonly used by clients:

- **Denial.** The first response to an unfavorable result is denial. The participant may deny that the results are accurate or may assert that the information provided is not relevant to them or their job.
- **Anger.** If the participant can move beyond denial to accept that the data is valid, he or she may express anger towards his or her raters.
- **Blame.** Coupled with anger, the participant may attempt to blame the raters and/or other external factors for results perceived to be poor or unrepresentative of themselves. For example, it is not uncommon to place blame on the assessment, the organizational culture of his or her workplace, or the supervisor or HR professional who sponsored the assessment.
- **Shame.** Once the participant has had an opportunity to reflect on his or her results, feelings of shame often supersede blame. In fact, redirected anger can be a defense mechanism for embarrassment experienced in response to the results. This feeling is often amplified by the presence of a coach.

- **Paralysis by Analysis.** The EQ 360 2.0 is rich with information; unfortunately, if not managed effectively, that information can be overwhelming to the client. As is the case with the EQ-i 2.0, it is necessary for the coach to work with the client during a feedback session to address the most salient results. Managing this information can help prevent the client from getting lost in the information (i.e., paralysis by analysis). The client can then be directed to a more positive outcome.

EQ 360 2.0

Raters should be provided with some form of feedback after participating in the EQ 360 2.0. Remember, raters have taken the time to complete the EQ 360 2.0 on behalf of your client, playing an invaluable role in your client's development. If raters are not engaged following the 360 they may feel as if their feedback was not heard or acted upon, or that the 360 process was simply another survey where their voice was not heard. Encourage your client to share the action plan or steps for development with colleagues. Sharing a plan for acting on that feedback will certainly send a strong message of follow-through and continuous learning.

The Development Process

By providing adequate time to process and understand the feedback, both the clarity of the concepts and the client's comprehension of implications and recommendations can be enhanced. Allowing the opportunity for the client to ask questions and share relevant examples of their behavior is also important for facilitating engagement and understanding. It is recommended that clients be provided with direction regarding development priorities and strategies; in other words, it is important to address "what's next" with the client after reviewing assessment results. The following best practices will help the coach ensure client compliance while working through the stages of change.

1. Readiness for Change

In order for effective change to occur, the coach and client must be aligned in their willingness and commitment to make change. During the feedback process, you should consider and probe the readiness of your client to embark on a given process. According to the Transtheoretical Model (Prochaska, DiClemente & Norcross, 1992), the further along the continuum of change one is, the more likely one will adhere to one's plan and achieve meaningful change. As a general guide, you should consider where your client resides at the onset of the coaching relationship. Should the client not be ready for change, patience and guidance will be necessary to bring the client to a point of readiness. The following include the stages of change that should be considered.

- **Pre-contemplation.** When a client appears to reside in the pre-contemplation stage, change will be difficult; the client is unlikely to embrace the actions required for change in the foreseeable future. There are, however, a number of reasons why one might reside in this stage, including previous pitfalls and not having access to relevant and compelling information. In either case, a compassionate and informative coach may help move a client beyond the pre-contemplation stage.
- **Contemplation.** In this stage, a client is actively preparing for change and is aware of the pros and cons of change, but may be paralyzed by the consequences of the cons. That is, although the long-term benefits are enticing, the short-term pain deters action. Working with a client in this stage to set small, meaningful goals with little consequence but meaningful gain, can help them move beyond the contemplation stage.
- **Preparation.** The preparation stage is associated with action. A client who has taken a significant step towards meaningful change, such as initiating an EQ-i 2.0 feedback session, establishing a personal goal, or simply preparing for change, is in the preparation stage. These clients are ripe for change and when properly guided are likely to embrace it. Through effective coaching and support, you can help move the client from the preparation stage to the action stage.
- **Action.** The action stage encapsulates willingness to change and behavior modification, and is typically associated with sustained change of greater than six months. In this case, as in all effective feedback and coaching processes, follow-up must be incorporated into the program. When a client has embraced a change and continues to live it for more than 6 months, it is likely that a positive and enduring behavior modification has occurred. During the coaching and feedback session, it may be helpful for you to probe and determine what successes the client has achieved in the past and what resources he or she has to support positive emotional change.

This Transtheoretical Model provides a simple yet practical framework by which you can assess the readiness of your client for meaningful change. Should the client not be completely ready, you are then equipped with a framework to help move the client from a stage of contemplation to one of action.

2. Managing Expectations

It is crucial for you to manage not only your own expectations, but the expectations of your client. Creating positive expectations for the feedback and development process can be effective for instilling change, provided these expectations are coupled with rich and relevant examples of successes in emotional and social change. If the client can relate to examples of meaningful change that can be linked to increased

well-being, job-satisfaction, or performance, he or she is likely to see a value proposition for engaging in EI training and development.

3. Maintaining Independence

In line with the stages of change outlined above, the coach must recognize that people are most likely to change when they feel free to do so. During the coaching phase of feedback, the coach should work toward fostering autonomy in the client by allowing him or her to set personally relevant and meaningful goals. Guidance should be provided to ensure that each goal is deemed personally relevant and that the client is committed to it.

In conclusion, this chapter addressed a number of best practices for providing meaningful and effective feedback. Of central importance is the ability of the coach or consultant to clearly establish his or her role in the feedback process, what that process will entail, and what is expected of the client post-feedback. In collaboration with the client, establishing purposeful feedback goals that can set the stage for an optimal development experience is the responsibility of the coach or consultant.

CHAPTER 10

Coaching Fundamentals

Emotional Intelligence can be developed. Is it easy to develop? Certainly not! Change does not happen overnight and improving upon EI skills is no different. Individuals embarking on personal growth in the area of EI benefit from ongoing and extensive understanding, commitment, practice and feedback that results from the relationship with an EI coach (Hughes, Thompson & Terrell (eds), 2009).

This chapter contains an overview of coaching strategies and techniques that align with the EQ-i® 2.0 and EQ 360® 2.0. Strategies presented will include both individual and group-based coaching techniques along with best practices to ensure that both you and your client receive the greatest benefit from the EQ-i 2.0 experience. When used as part of an intensive development process, coaching interventions based on EQ-i 2.0 skills have been shown to increase participants' EI in post coaching assessments (Dulewicz & Higgs, 2004; Fletcher & Leadbetter, 2009). Following the best practices provided in this chapter will set you up to experience the same success in your coaching practice.

The EQ-i 2.0 Model

The EQ-i 2.0 model (see chapter 3) is an easy way to visually describe what emotional intelligence is and which skill areas contribute to your overall emotional effectiveness. Coaches can leverage the EQ-i 2.0 model in several ways:

- To introduce the concept of emotional intelligence to clients.
- To review the components of emotional intelligence before providing feedback on the client's assessment.
- To highlight areas where the client will focus their development after providing feedback.
- To clarify any questions clients have about what emotional intelligence is and is not.

What is a coach?

The International Coaching Federation (ICF) defines coaching as "partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential."

A coach is someone who works with individuals to help them develop a skill. For example, a sports coach works with athletes to help them improve their performance in their sport. A manager coaches direct reports in order to help them improve their performance at work. Depending on the skill level of the direct report, they may need more or less coaching from their manager.

Coaching vs. Counseling

Your role as a coach is to facilitate a process where clients understand where they are in the present, where they need or want to be in the future, and what steps, or development opportunities, they need to take to get there; it is about development and maximizing potential.

Counseling is a process that enables a person to sort out issues and reach decisions affecting their life. The focus is on helping clients overcome or fix problems in their lives, usually by looking back at their past to determine how to get better in the future. Many times we seek counseling when we are in a crisis in our lives. For example, couples will go to a marriage counselor when they are experiencing difficulties in their marriage and need some outside intervention.

Your Role: The EQ-i 2.0 Coach

As an EQ-i 2.0 Coach, your role is to work with your client on the areas of the EQ-i 2.0 he/she will develop. If you have education and experience in counseling, you may, in certain circumstances, choose to counsel your client. If you do not have a background in counseling, you will refer your client to a professional if appropriate (many times this is accomplished through an organization's internal Employee Assistance Program). For example, as you are providing feedback to a client on his EQ-i 2.0 results, he tells you that he's been feeling overwhelmed and depressed lately. If you are a coach, and not a counselor, your response would be to refer your client to a professional counselor.

As a professional who uses psychological tests you should confine your testing and related coaching activities to your area of competence (as demonstrated through your education, experience, training and credentialing) (APA, 1999). If the time comes when you feel unequipped to discuss a particular matter with your client, you are ethically responsible to ensure that the client has another professional from whom to seek help. You may never need to use a referral, but if you do, you should be able to easily provide your client with that contact information.

According to the ICF ("Core Competencies", 2011), a coach's responsibility is to:

- discover, clarify, and align with what the client wants to achieve,
- encourage client self-discovery,
- elicit client-generated solutions and strategies,
- hold the client responsible and accountable.

If you are not a professional coach, there are still some foundational principles you can demonstrate in order to effectively debrief your client's results:

- **Follow your client's energy.** You may want to better understand your client's responses to the Impulse Control subscale, but if your client would rather start at Independence, then that's where you start.
- **Listen more than you talk.** Asking open-ended questions helps because it forces your client to give you more than a one-word response.
- **Come from a place of curiosity, not judgment.** We make judgments all the time; asking non-judgmental questions and making non-judgmental statements goes a long way to ensuring you stay on the curiosity path. Some good examples are: How do you find yourself using Assertiveness at work, what does it look like? It sounds like you get frustrated when you don't speak up in team meetings, is that right?
- **Add suggestions for development strategies only after your clients come up with some ideas of their own.** What works for one person may not necessarily work for another and you may need to tap into what each client is willing to do – otherwise you will find at your next coaching session that little progress has been made.
- **Hold your clients accountable for their progress.** Help keep them accountable by ensuring they identify a support network of people who will give them feedback as they work on their development, and help share their successes.

You can do this by:

- Listening actively (maintain eye-contact, recap what you've heard, nod to acknowledge understanding).
- Paraphrasing back what you heard; both, what the client said and the emotion behind what was said.
- Guiding your client through a self-discovery process - many 'a-ha' moments come from what we are led to self-discover.

EQ 360 2.0

When coaching someone with the EQ 360 2.0, you should always start with the self-report results. It is important to get validation from your client on how they see themselves before giving them feedback on how others see them. You may want to schedule the sessions a week apart in order to give the client time to absorb and reflect on their self-report results first. That way, when they are presented with the feedback from others, they have already thought about how they see themselves using the 15 subscales. When they get information from others, they can more quickly understand what it means than they might have if they were given the feedback at the same time as their self-report results.

Coaching: Different Approaches

While these are some general guiding principles, there are many different approaches taken by coaches when working with clients on developing their emotional intelligence using the EQ-i 2.0. The following are three examples of how the EQ-i 2.0 can be used with different coaching approaches.

Client-Centered Approach

This approach puts the client in the driver's seat. The coach acts more as a facilitator helping the client come to their own conclusions rather than guiding or steering the client in a certain direction. While many coaching models incorporate certain aspects of client-centered coaching within their approach, this model is entirely client-centered.

When coaching a client on their EQ-i 2.0 results, a client-centered approach means that the client will determine where they want to focus their development. The coach asks a lot of questions to help the client establish their development plan, but the questions are self-discovery questions rather than leading questions. Examples, of good client-centered opening questions during an EQ-i 2.0 feedback session are:

- Where would you like to start?
- What strikes you when you look at your results?
- What jumps out at you?

These questions allow the client to determine the direction of the conversation rather than the coach. The coach follows the client's lead.

Benefits of a Client-Centered Approach

This approach is the best way to ensure client buy-in and gain commitment to following through on EI development. Your questions will help your client decide on the most important development areas as well as strengths to leverage. For example:

You say that Empathy is a clear strength for you. How do you know? What examples do you have to support this? What feedback have you been given? How does that play out with your direct reports? How has that helped you be successful in your role?

Or

You said that your low levels of empathy have held you back from advancing in your career. Tell me more about that. What feedback have you been given to support that? (and eventually) What do you think you can do to develop your empathy further? Who can you ask to observe your development and provide you with feedback on how you're doing?

Both of these situations place the client at the center. The client is responsible for determining the areas of development and, with the guidance of the consultant, the process by which development will take place. Your role is to facilitate development by asking good questions in order to help the client decide on the best course of action.

Drawbacks of a Client-Centered Approach

There are a number of benefits to the application of the Client-Centered Approach as outlined above. Equally important however, are the potential limitations of such an approach. Table 10.1 highlights the drawbacks to the Client-Centered Approach.

Strengths-Based Approach

According to Peter Drucker, "one cannot build on weakness. To achieve results, one has to use all the available strengths ...these strengths are the true opportunities." (Drucker, 1967, p. 60)

The premise of this approach is that it is easier to build on a strength than to try to work on a weakness. Because something is a strength, we are familiar with it, we are comfortable leveraging it, and we get success from using it. Working on a weakness is difficult and may not give us the same payoff in the long run. An individual can work on her Social Responsibility for years, but if it is not critical to her role, she may not see any value in spending so much time developing it. Conversely, if she has good Reality Testing and gets rewarded and praised for her ability to see things objectively and realistically, she will want to keep doing that and leverage that skill often. As they say, that which is rewarded is repeated.

Appreciative Inquiry (Kinni, 2003) is an approach that works very well with a strengths-based coaching model. AI looks at what is working well and then examines how to capitalize on it, or make it better. With a client's EQ-i 2.0 results, this would translate as focusing on the strengths (as identified in the report and validated through the feedback process), and looking at how to leverage those strengths further.

AI is comprised of four stages: Discover, Dream, Design, and Destiny (Kinni, 2003). From an EQ-i 2.0 perspective, this is how each stage might look:

- **Discover:** What is working well with your client, and what are their EQ-i 2.0 strengths?
- **Dream:** What do they imagine as a positive outcome from your EQ-i 2.0 coaching?
- **Design:** What are the concrete actions that will give them that positive outcome?
- **Destiny:** Implementation of the actions in order to realize the dream.

Here is an example of what the four stages might look like in an EQ-i 2.0 feedback session:

You are working with Gerry, a Call Center Manager, providing him with feedback on his EQ-i 2.0 results. His results show clear strengths in the areas of Empathy, Stress Tolerance, and Impulse Control. Gerry has provided you with good examples of how these particular skills are strengths for him. You'd like to go through an appreciative inquiry process to help Gerry further develop these strengths.

- **Discover:** Gerry's strengths are Empathy, Stress Tolerance, and Impulse Control.
- **Dream:** Gerry would like to be more proactive in his role. He finds himself spending the majority of his time fighting fires, and dealing with crises that he feels could have been avoided with a more proactive approach.
- **Design:** You and Gerry create an action plan based on his strengths in order to decrease the amount of time he spends in a reactive mode. You focus on leveraging his three strengths so that he can work with his employees to become more proactive.
- **Destiny:** You work with Gerry to ensure he leverages his strengths in order to put that action plan in motion.

Below are some questions you can ask through the AI lens:

- **Discovery:** What do you see as your primary EQ-i 2.0 strengths? How do those strengths contribute to your success? What positive feedback have you received with regard to those skills?
- **Dream:** If you leveraged these subscales, where do you see yourself in six months? In one year? How do you see leveraging these strengths will contribute to a successful outcome?
- **Design:** What do you need to do in order to meet that outcome? What are some strategies you can employ in order to get you there? What are some tangible actions you can take to meet your goals? (see Action Plan in the EQ-i 2.0 Workplace Report)
- **Destiny:** How will you ensure that you'll follow your action plan? Who can you involve in order to ensure you work on what you've committed to? (See Development Commitment in the EQ-i 2.0 Workplace Report)

Table 10.1. Drawbacks of a Client-Centered Approach

Drawback	Consequence	Result	Suggested Solution
Your client is not self-aware.	• Your client is surprised at the results. • Your client has no way of supporting the results, cannot provide examples of subscales they are skilled or unskilled at. • Your client cannot come up with a development strategy.	• You are doing all the work. • Your client may not buy in to the results of the EQ-i 2.0.	• Try a different approach. • Conduct the feedback over multiple sessions: first provide results and explain what they mean; next have the client reflect on the results and come back prepared to give you examples; and then have them reflect on strategies that worked for them in the past and might be applicable to the areas they want to develop.
It takes longer than other approaches.	• Your client gets frustrated at the slow pace.	• Your client loses momentum and motivation to work on different development strategies.	• Explain the process and rationale at the beginning to get buy-in. • Check in at regular intervals to ensure motivation is still there. • Have your client determine what they will do if they lose momentum. • Take it in smaller steps (e.g., work on one subscale at a time, letting your client decide which one, and what strategies to use to develop that one before going on to another).
It is more work for you.	• You need to be prepared to go wherever your client goes, which involves doing your homework and thinking on your feet.	• You may not feel the session is going the way you want it to because you are not in control of the conversation.	• Let go of your ego; this is a client-centered approach and the best way to help your client is to be in the moment with them – you do have control, you just need to use it differently than with other coaching approaches.

Table 10.2. Drawbacks of a Strengths-Based Approach

Drawback	Consequence	Result	Suggested Solution
Your client immediately focuses on the areas that are showing as weaknesses for him.	Your client cannot get past his areas for development and doesn't buy into what you are trying to focus his attention on.	Your session doesn't go anywhere, you and your client get frustrated, and the session ends unsatisfactorily.	• Go with your client's energy. Allow him to get clarity on the area he is focusing on before you try to gain buy-in into building on the strengths. • After getting clarity on his weaknesses, you can redirect your client to his strengths by asking questions such as, "What strength can you leverage to help compensate for this area of development?" This shifts the focus nicely to a strength, and allows the client to work on the weakness indirectly.
Your client sees that she has some subscales in the high range and wants to build on those skills but she may actually be using these skills at inappropriate times	Even areas of strength can be misapplied.	Your client becomes confused by not knowing when it is a good idea to use a strength, and when it is not.	• Consult the Balancing Your EI section to help identify which subscales to leverage for development. • By focusing on patterns with your client, she will be able to identify behaviors associated with her high scores that have led to her success, and others that have held her back.

EQ 360 2.0

Coaching to strengths works very well with the EQ 360 2.0 in that you have information on your client's strengths that is received from many third parties. You and your client can choose to develop known strengths (i.e., those EI skills that were rated relatively high by your client) or strengths that were in your client's blind spots (i.e., those EI skills that were rated relatively high by raters, but received lower ratings from your client). Once strengths are validated based on the ratings and comments in the EQ 360 2.0 report, and confirmed through your dialogue with your client, you and your client can then focus on leveraging these strengths in various workplace situations.

Benefits of a Strengths-Based Approach

The EQ-i 2.0 lends itself nicely to a strengths-based coaching approach since you can start with confirming that the areas your client has self-reported as strengths are indeed your client's strengths. Once you have agreement and examples to support this, you can easily look at ways to further build on these strengths.

This approach is also a very positive experience for your client. Focusing on things he does well already is much less overwhelming than looking at a deficit and trying to determine what, if anything, can be done to develop it. Research in the field of positive psychology supports the notion that individuals who are involved in development activities where they are encouraged to leverage their strengths in new and interesting ways report higher levels of happiness and lower levels of depression for a sustained period of time (Seligman et al., 2005).

The EQ-i 2.0 subscales do not work in isolation of each other. They work together to produce the results that your client sees in their day-to-day use of the skills. Often, you can leverage a strength to help compensate for a weakness.

Case Studies Using a Strengths-Based Approach

Case 1: John Leverages Interpersonal Relationships To Better Manage Stress

John's results show (and he confirms) that he is highly skilled at Interpersonal Relationships – he builds and cultivates relationships at work and outside of work, keeps in touch with former colleagues and is up-to-date with friends. People tell John that he is good at building and keeping relationships. In the debrief process, however, John tells you that he is struggling in dealing with stress (and the EQ-i 2.0 Stress Tolerance results confirm this). He also mentions that his health and well-being are beginning to suffer with high blood pressure, weight gain, etc. A potential way to build up his stress tolerance would be to leverage his network of support. Some examples of doing this would be suggesting that he join a gym with a friend, go for a walk with a coworker at lunch, etc. Additionally, because John's relationships are likely built on trust, he could confide in a friend (who manages stress well) about the stress he is experiencing and perhaps seek some new coping strategies. By leveraging his interpersonal strengths, he will be in a better position and have more resources to manage the stress he experiences.

Case 2: Susanna Leverages Emotional Self-Awareness To Be More Assertive

As you are providing feedback on Susanna's EQ-i 2.0 results, she focuses on her lower Assertiveness score. She tells you that she has taken Assertiveness training courses but with very limited results and she believes this deficit has held her back from moving to the next level of management at work. As you are discussing the results further, Susanna shares several examples of her ability to recognize and name her emotions. She is highly aware of what she is feeling in the moment, and most of the time can identify the cause. In this case, you can work with Susanna to help her identify the emotions she feels in the moments when she would like to be more Assertive. What is holding her back? Once she is able to name those emotions, she can start working on strategies to overcome them, which will lead to increased assertiveness.

Limitations of a Strengths-Based Approach

There are a number of benefits to the application of the strengths-based approach as outlined above. Equally important, however, are the potential limitations of such an approach. Table 10.2 highlights the drawbacks of the strengths-based approach.

As a practitioner, you have to guide your client down the fine line between leveraging a strength and possibly misusing that particular strength. Although as a general rule higher scores are better on the EQ-i 2.0, you can imagine contexts where doing a particular behavior (e.g., voicing opinions) "always" could be ineffective to teamwork. Howard Book (2009) has some recommendations for coaches when determining whether over relied upon strengths have become weaknesses:

- *Look for balancing skills for any enhanced strengths.* Balancing skills help complement the enhanced skill and should be sufficiently present (e.g., high assertiveness needs high empathy for balance).
- *Explore with the client whether or not the strength has any associated costs.* You might ask for some examples of where your client's empathy might have derailed him from making a tough decision.
- *If balancing skills are low,* development efforts can be aimed here to help ensure the enhanced strength doesn't become a liability in some situations for your client.

Model Approach

This approach demonstrates that there is a logical progression to your coaching session based on a particular model you are using. The EQ-i 2.0 model fits well with this approach. The model starts with the emotional intelligence subscales that make up Self-Perception – how does your client see himself? Once he understands that, the model moves on to the subscales that make up Self-Expression. This goes from how he sees himself to how he expresses himself. That moves into how he interacts with others. Based on his interactions, how he sees and expresses himself, he makes certain decisions. And that directly impacts his ability to manage stress. Each of the composite areas builds on the one before it. The different

components of the model work together to establish overall emotional intelligence and well-being, and your client needs to understand how they work together in order to understand his results.

Benefits of the Model Approach

This approach helps your clients understand how their results on the individual subscales fit into and impact their overall emotional well-being. It is a highly structured approach which clients will appreciate and understand easily.

Because of the structured nature of this approach, you can determine how much time you'd like to spend on each composite scale and the subscales within it. In this respect, you can ensure that you cover everything you want to cover in your session.

Drawbacks of the Model Approach

The simplicity of the Model Approach is a clear strength of this feedback process, especially for novice consultants. There are, however, potential limitations to the Model Approach which are highlighted in Table 10.3.

Using the Strengths-Based and Model Approaches with Groups

The strategies presented so far pertain primarily to one-on-one coaching. There are times, however, when you might be in a situation where you need to coach groups of people on specific development areas. For example, if you are working with a senior team who, as a group, need to be strong in certain subscales or composite areas, you can work with them as a group on their development plans. What do they need to do as a team to ensure they are leveraging those skills they feel are important?

Setting the Stage

Here are some guidelines to keep in mind when planning a group coaching session:

1. **Set ground rules at the beginning.** What is confidential? What isn't? How will we handle conflict when it comes up? How do we ensure everyone is engaged and participating in the discussions and action plans? These are just some of the questions that need to be addressed and agreed to at the beginning of the session in order to set it up for success.
2. **Ensure there is trust on the team.** There will be some fairly candid and open discussions, so people need to be comfortable with each other in order to open up and share information.
3. **Get agreement on what's important.** The group needs to agree on which composite scales or subscales are important to their roles. You can facilitate this process at the beginning if they don't already have something in place. If you are given the information, you need to validate it with the team at the beginning of your session. That way you ensure there is buy-in right from the start.
4. **Clarify your role.** You are a facilitator of the process, and you will provide expertise in emotional intelligence and the EQ-i 2.0. You cannot tell them what to do and how to do it. Each group is different and they will know what works for them much more than you will. Allowing them to take the lead will increase the chance that they will follow through on what they have commit to.

Table 10.3. Drawbacks of the Model Approach

Drawback	Consequence	Result	Suggested Solution
The coach needs to spend more time up front explaining the model.	Your initial session is very long and you do a lot of the talking.	You do not accomplish all that you want to in the initial session.	▪ Have an initial session with your client prior to the feedback session where you only go through the model. ▪ Send the model out ahead of time so the client can become familiar with it and you won't have to spend as much time describing it in your meeting.
The coach tries to explain the model and provide the results in the same session.	The client sees their results while the coach explains the model and focuses on that.	The client has tuned out the coach because he is focused on his results.	▪ If you are providing feedback in person, do not turn to the results page until you are sure the client understands the model. ▪ If you are providing feedback over the phone, email the client a copy of the model first, then when you are ready, email him the report.
The client prefers an unstructured approach.	Your client gets frustrated and becomes impatient.	Your client may see you as inflexible and the assessment as stiff and linear.	▪ Once you've described the model initially, allow the client to choose which subscale to focus on; you can make the connections to the model as you go along, gaining buy-in and understanding from your client while still being flexible in your approach.

5. **Structure activities but be flexible.** As with facilitating a workshop, process facilitation requires clear instructions around what you expect them to accomplish and how much time they have in order to accomplish it. Where it differs is that with process facilitation, the team may decide that they want to spend more or less time on a particular activity than you had planned. When this happens, your role is to raise the issue (e.g., "There's great discussion going on right now and I sense you want to continue talking this through. The downside is that we won't get to X by this afternoon as we previously discussed. Is everyone okay with that?"). Once you get agreement from the team on the direction they want to go in, you can proceed.

It is not only in the participants' best interest but also yours to not share individual EQ-i 2.0 results in a group setting. A test taker should never be put in a position where there is pressure to divulge results, regardless of how friendly, open or closed the culture within the group or organization claims to be. You cannot be certain of every participant's willingness to share results. Additionally, you cannot control decisions that are made after EQ-i 2.0 results are shared. The legal implications of this situation, not to mention the potential breach of confidentiality, are two risks better left avoided.

Structuring the Group Coaching Session

Prior to conducting a group session, each individual should have one-on-one feedback debriefs on their EQ-i 2.0 results. Giving them personal feedback does a few things: it helps them understand where they are at personally and where they want to develop, it gives them an understanding of what emotional intelligence is and what the different subscales mean, and it starts them thinking about their team and where they are as a group.

Here are some ideas on how to structure your group coaching session:

Opening the session

- Open with high level objectives and confirm them with the group. This approach ensures a shared understanding of what they are there to accomplish.
- Show the agenda so participants are aware of how much time they can spend on any given piece of the session. This agenda can be flexible, but refer back to it when you need to determine with the group whether or not to spend more time on a topic than previously allocated. It also shows the importance of each area; the areas you spend more time on should be the ones that are the most important.
- Go over group protocols. Set your protocols for the group up front so that everyone knows what is expected of them and they can hold each other accountable.

The middle of the session

- Review the EQ-i 2.0 and quickly go over the model and definitions. This review should be a refresher since they each had a one-on-one debrief. Ensure everyone understands the foundation of the session.
- Review the group subscales that you will be focusing on in the coaching session. The group subscale results should have been given out prior to the session. You need to ensure everyone is on the same page with which subscales are the ones primarily required for them to be successful.

When results are shared,

  - » Create smaller groups to work on strategies that they can employ as a team to increase and develop in each area that identified as important to their success. The teams should consist of no fewer than three people and they should be relatively high in that subscale. For example, if they have identified Social Responsibility as a key area for them, one idea might be to create a culture of recognition. They do not need to decide the details for what that looks like or how they would implement it (or what the budget might be). This stage is just about brainstorming ideas. For smaller groups, you would work on all the strategies together as one group.
  - » Each team comes up with as many ideas as they can on their one or two subscales and then reports back to the larger team.
  - » During this debrief, participants listen, take notes, and ask clarifying questions. No one is allowed to shoot down any ideas at this point. You want as many ideas on the table as possible.
  - » Next you can put them in groups where they are relatively low in a particular subscale. This group needs to look at the ideas and determine to which ones they can realistically commit. By having the lower group determine what strategies they will implement, you have a greater chance of obtaining buy-in and commitment.
- Once the second round of group work is complete, have each team prepare an action plan for implementing their strategies. You can use the template provided in the report or use your own. Either way, ensure they come up with a concrete, realistic plan to start working on the subscales identified.
- Each team shares their action plans with the larger group, refining and adjusting the plan as required. Once the plan is in place, each person must commit to it and add it to their personal development plan.

Closing out the Group Coaching Session

- This coaching session will most likely take place over a number of sessions. Once the team has created their action plan, they need to identify checkpoints when they will review their progress as a team. They may have divided the development opportunities amongst the group, having subgroups each work on a few areas. They may have decided to all commit to working on everything. Whichever approach they take, they need to evaluate their progress along the way. Have them create a schedule of milestones:
  - How quickly can they start working on the identified areas?
  - Who will take the lead?
  - When can they expect to see changes taking place?
  - How will they hold themselves and each other accountable?
  - How will they reward themselves for progress?
- Remind them of the objectives of the session, and confirm whether they have met the objectives set out at the beginning.

Group Coaching Example

Susan is the V.P. of Human Resources at one of the largest banks in the U.S. She has completed an EQ-i 2.0 and has been given her personal feedback. She has twelve directors working for her whose teams provide human resources consulting services to the front line managers. While all of the subscales are important, Susan and her team have identified the following subscales as the most critical to their success as HR leaders and also as partners to their internal customers:

- Emotional Self-Awareness
- Emotional Expression
- Self-Actualization
- Empathy
- Social Responsibility
- Impulse Control
- Stress Tolerance
- Optimism

Her team is a high-performing team, winning several awards and recognition from their clients. Their employee survey results have been good overall, but there are some areas that come up year after year, specifically with regards to communication, workload, work/life balance, and providing advancement opportunities. The team has been together for at least 5 years, and they are generally a close and supportive team. They have developed a culture of openness and are eager to get some assistance in how to tackle the noted areas of the employee survey.

In the session, the EQ-i 2.0 consultant divided the group into four teams of three. Each group would take on a subscale that was identified as important for success as HR managers. They brainstormed ideas on how to develop that subscale and presented their ideas back to the larger group. They then were divided again into four groups of three, again given a subscale that was deemed important to the team. Again they brainstormed ideas and presented them to the group. This process was repeated until all of the important subscales were covered. Everyone examined all brainstormed strategies. Their job was to determine which of these strategies was within their ability to implement, based on their ability to stretch outside of their comfort zone, but not so far out that they would not be able to accomplish it. Once these action plans were developed further and committed to, the group put timelines in place for review.

The group decided that for Self-Actualization, they would start up an informal mentoring program. This program would begin to address the perceived lack of advancement opportunities that the employees wanted to address, and was just a little outside of the comfort zone of those with the lowest self-actualization scores.

Facilitating a Development Planning Workshop

If you coach people one-on-one, you will most likely incorporate development planning into your coaching sessions. When you are working with groups, however, it may be better to run a development planning workshop with the entire team. Aside from the obvious time-savings, there is a lot to be said about the synergies that occur when people are in a room together working towards a common goal: improving their emotional intelligence. People can be held accountable if they all hear the same message in the same way at the same time. They can also feel the shared accountability when they are 'all in this together'. As well, commitment and buy-in increases when your leader is an active participant in the process.

Table 10.4 presents a sample agenda for a half-day development planning workshop.

Table 10.4. Sample half-day development workshop agenda

Time	Activity	Resources
9:00 – 10:00	**Objectives of Session** **Agenda** **Ask team:** • What is emotional intelligence? • Why is it important in the work you do? **EQ-i 2.0 Review:** • In groups, divide subscales evenly and have teams come up with an observable behavior that would tell you someone is strong in that area.	Flip Chart paper Subscale Definitions page
10:00 -11:30	**Development Planning** • In table groups, have participants list the top five subscales they feel they need to leverage the most in their roles. Have the larger team come to a consensus on the top 5 or 6 subscales. • Next have each person review their personal EQ-i 2.0 results and look at how well they leverage those same subscales. • Hand out the development planning template (from the report or you can use your own template). • Introduce SMART Goals (Specific, Measureable, Attainable, Realistic, and Time Bound). What does the acronym stand for? Why is it important to follow? • Have participants look at their own results and reflect on the following questions: » Where are the biggest gaps? » Where is the greatest agreement? » Where will you get the biggest bang for your buck (in other words, where will you make the biggest impact if you work on improving it)? **Pair and Share** • Participants partner up and share their biggest gaps and agreements (they can reveal as much or as little about the size of the gap or agreement). Partners are selected in a complementing manner: if your biggest gap is my biggest agreement, we're partners. • The partner who has the biggest agreement on a particular subscale coaches the partner who has the same as their biggest gap. They can ask questions like: » What feedback do you have to confirm this is a gap for you? » When do you notice it the most? » What is one thing you can do to develop that skill? » Who can provide you with feedback on how you're doing? • Each coaching session lasts 5–7 minutes. Then the person who was the coach finds someone to coach them on their biggest gap. • The end result is that each participant walks away with at least one tangible strategy that they can implement right away.	Specific Measureable Attainable Realistic Time bound
11:30–12:00	**Wrap-Up and Follow-Up** Have a large-group discussion to determine what obstacles will stand in the way of people being successful in their development opportunities. As a group, brainstorm ways to overcome these obstacles so that they don't hold you back if you do encounter them. End by reviewing the objectives of the session to confirm if they have been met.	

Here is an amended outline for times when you only have one hour to do development planning. In that case, you will need to provide participants with some pre-work:

- List the 5 or 6 subscales that are the most critical to your role
- List your top 5 or 6 subscales as reported by your EQ-i 2.0 results
- Compare your top five with the ones required for your role:
  - » Where are the gaps?
  - » Where is the agreement?

Have participants bring their pre-work to the session and spend the time in class focused on the coaching piece. Have them peer-coach to further develop their strategies. After the session, they will need to:

- Finalize their development plan, ensuring that they follow the SMART (Specific, Measureable, Attainable, Realistic, and Time Bound) goal setting method.
- Bring their development plan to their next one-on-one with their manager:
  - » Share the plan with their manager
  - » Discuss what role the manager will play in the action plan (e.g., providing an opportunity, removing obstacles, observing behavior and providing feedback and guidance).

The post-session piece is critical because as the facilitator you will most likely no longer be part of the process. In order to set the group up for success, you need to ensure that managers are on board and understand their roles in the development planning process.

Evaluating Progress

Individual Coaching

How do you know when an intervention has worked? How do you know that a particular activity will give you the result you want? How do you know that if you work on this skill by using that strategy, you will be able to develop a particular skill? It is vital that you set up a process to evaluate the progress of your clients. Below are some best practices you can engage in to get you there:

1. Before debriefing results, have clients identify areas that they believe they are strong in, and areas that are more of a struggle. Provide them with a focused set of questions such as:
   - » Which of the 15 subscales do you believe you leverage regularly? How do you know?
   - » Which of the 15 subscales do you believe you leverage less frequently? Why do you think that is?
   - » Which of the 15 subscales do you believe are critical to your success as a leader?
   - » What feedback have you been given that confirms your self-assessment?
2. Review responses to the questions above and compare them with results on the EQ-i 2.0:
   - » How accurate were they in their self-assessment?
   - » How will you address the areas that they were not accurate in?
   - » How do their EQ-i 2.0 results compare to the subscales they have identified as critical to their success?
   - » How will you address the gaps with them?
3. During the feedback session, focus your client on validating the information by asking for examples. The more examples they can provide, the better.
4. Ensure that any development plan they create is SMART (Specific, Measureable, Attainable, Realistic, and Time Bound).
5. Ensure your client does not focus on more than 3 development opportunities at one time. Too many will increase the chances of becoming overwhelmed and discouraged.
6. Ensure your client has someone who can can observe them executing their action plan. That way they can provide instant feedback and the client can learn from that as they continue to try out their new skills.
7. If you have an ongoing relationship with this client, make sure you discuss their EQ-i 2.0 development plan every time you meet, even for just a few minutes at the beginning of the session. Revisiting the development plan keeps it top of mind and goes a long way to ensuring success.
8. Ensure your client comes up with ideas for further developing their skills first, before you offer up suggestions. Your client will commit to their ideas more readily than yours.
9. While there is no black and white answer to when it is a good time to retake the EQ-i 2.0 to check progress, a good rule of thumb is to re-assess your client no sooner than two to three months after they have implemented their development plan.
10. Ensure you have complete commitment from your client when they are embarking on a development plan. If they are not committed, ask what needs to change in order for them to commit.

Group Coaching

If you are working with an organization looking to increase the emotional intelligence of teams rather than one-on-one, there are different ways to evaluate success on an organizational level:

- Link development plans to competencies: ensure that whatever competency model they use is clearly linked to the emotional intelligence skills they need to develop.
- Link development plans to clear measures: perhaps the group is looking to increase employee engagement and they measure this through a series of questions on the annual employee survey. Once you know which pieces of the survey are linked to the EQ-i 2.0, you can focus the clients on increasing their skills in those particular areas.
- Compare the pre-intervention survey results with the post-intervention results to see whether there was an increase in scores.
- Examples of hard data that can be used to measure the effectiveness of an intervention include absenteeism, sick time, turnover, promotions, and hiring effectiveness.

Competency Models

Competency models are used in many organizations. They typically consist of a combination of hard skills (e.g., business acumen, degrees) and soft skills (e.g., communication skills, interpersonal relationship skills). When you engage with an organization to build the emotional intelligence of their workforce, looking at their competency model is a good way to get a sense of which emotional intelligence subscales are most important to their organization; makes it easier to speak in language familiar to them. If they use the term change management, you can connect it to the EQ-i 2.0 Flexibility subscale. If they refer to confidence, you can connect that to Self-Regard. Good communication skills could be connected to Interpersonal Relationships or Empathy.

Here are some typical competencies and how the EQ-i 2.0 connects with each of them.

Communication skills

- Empathy
- Interpersonal Relationships

Confidence

- Self-Regard
- Assertiveness

Life long learner
Focus on continuous learning/improvement

- Self-Actualization
- Problem Solving

Self-Awareness

- Emotional Self-Awareness
- Adaptable/Change agent
- Flexibility

Problem-solver/decisive

- Problem-Solving
- Independence

Interpersonal skills

- Interpersonal Relationships
- Empathy
- Social Responsibility

Team-focused

- Social Responsibility
- Interpersonal Relationships

Ability to deal with multiple demands/work well under pressure

- Stress Tolerance
- Optimism

Customer service focused

- Empathy
- Interpersonal Relationships

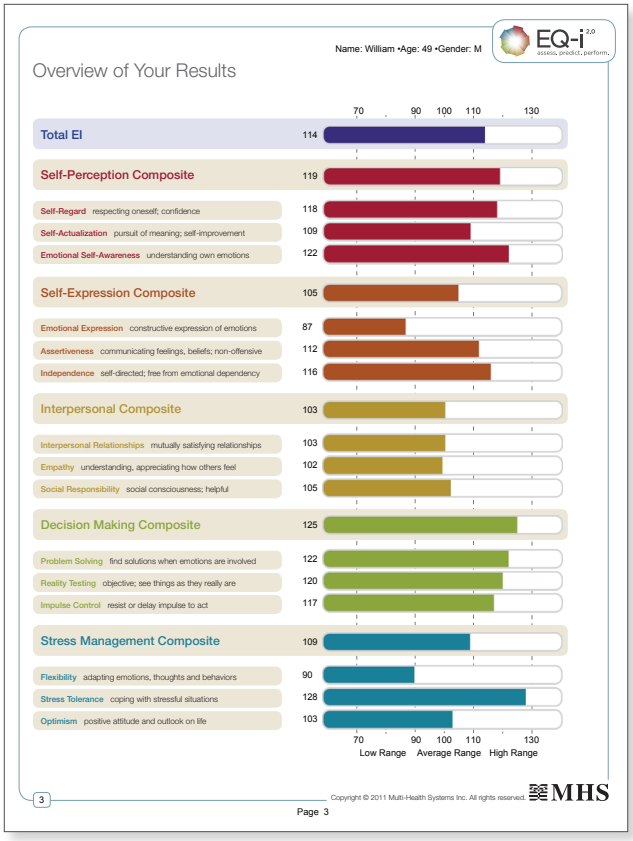
Coaching Resources

- For more coaching resources please visit the resource center at http://ei.mhs.com.

CHAPTER 11

EQ-i 2.0 Case Studies

This chapter includes 9 unique case studies spanning corporate executives, community leaders, athletes, and those in career transition presented by top emotional intelligence experts and consultants. Each case study presents the EQ-i® 2.0 profiles and is supplemented with the client's background information, interpretation, and insight into the coaching and development strategies used. The profiles, the collateral assessment information, and biographical information have been altered to protect the identity of the client and to adhere to acceptable ethical standards of psychological assessment. The results are discussed and a brief interpretation of the results is offered. Each case emphasizes the composite scales and subscales and illustrates the importance of looking at subscale scores in isolation, as well as the interactive implications of subscales. Each profile graph is derived from the EQ-i 2.0 Workplace Report.



Case Study 1

Submitted by: Brett Richards

Client Background

The client is the General Manager (GM) of a high-growth subsidiary of a large organization in the health sector. The organization is experiencing tremendous growth and is feeling the effects of that success in terms of resource stretch. It is a fast-paced environment and the whole organization is working long hours to keep up with the work. The client has been very successful at leading smaller niche enterprises with separate P&L's within larger global organizations for the past 7 years. The client is the type of leader where people gravitate to his integrity and values-based leadership style.

Summary of EQ-i 2.0 Results

The client's Total EI score (114) is well above the average range and represents a well developed overall level of emotional and social functioning. Experience and research has shown that more effective leaders typically possess above-average skills in emotional and social intelligence, which is the case with this client who has proven to be successful in several top leadership positions. While it is helpful to know the overall EI score, it is important to look at the composite and subscales to provide a more nuanced understanding of the unique strengths and areas of potential development for the client.

The five composite scales show enhanced abilities in Decision Making (125), Self-Perception (119), and Stress Management (109), which indicate a strong understanding and ability to monitor the way in which emotions participate in the decision making process. It also indicates an ability to look at decisions objectively, resisting the temptation to act rashly in difficult circumstances. This ability is particularly useful in a stressful, entrepreneurial start-up environment where change is the constant and ambiguity arises on a daily basis. The other composite scales indicate *relatively* lower scores, although all remain slightly above the average subscales.

A closer look at the subscales indicates a leader who possesses a high degree of confidence (Self-Regard) and self-awareness (Emotional Self-Awareness). He is self-directed (Self-Actualization, Independence) and likely thrives

in complex and stressful environments (Stress Tolerance) that require multiple strategic decisions on a regular basis (Problem Solving). This leader is very comfortable with getting his point across while meeting his needs in such a way that preserves rather than damages relationships (Assertiveness and Interpersonal Relationships).

Coaching Approach & Development Strategies

While the GM has many strengths, a few notable areas are worthy of exploration. Generally, this is a leader who actually thrives in and through change, and gets bored in an organization that is in maintenance mode. He appears to have a need to significantly improve organizations and the people within them, and this requires tremendous personal commitment and energy (Interpersonal Relationship, Social Responsibility, and Self-Actualization). Currently, his strong dedication and commitment to achieving significant organizational results within a high-stress, high-pressure environment may be taking a toll on his emotional well-being as witnessed by his markedly low (Happiness) score. Furthermore, as highlighted by his low Emotional Expression, he may have difficulty expressing his feelings to others within and outside the organization, which may stultify his ability to elevate his Happiness without focused effort. Being at the top of an organization can be quite isolating; therefore, I would encourage this leader to seek out a confidante, someone outside of the organization that he can talk to. This is a leader who has strong values and beliefs, which supports his principle-centred leadership approach. However, I would explore situations where this may, at times, potentially come across as being inflexible due to his relatively lower Flexibility score. For example, during strategic conversations, he may appear to be difficult to convince or shift his opinion, which could be frustrating to members of his team who believe in the merits of alternative courses of action that may fall outside of his fixed position or opinion. Further, showing more flexibility in certain situations could serve to enhance relationships, as well as the learning potential of his direct reports. This person, as a leader, may like routine both personally and professionally, finding it difficult to change personal strategies (Flexibility) that have proven successful in the past. It may be that, at this point and time, his "winning strategy" is not working successfully for him, and this may be causing some level of personal challenge. On the other hand, there may be circumstances occurring completely outside of the organization which are contributing to his relatively low state of contentment.

Overall, if this leader can strengthen his ability to share and constructively working through his inner thoughts and concerns more regularly with a trusted coach, he will be better positioned to increase his optimism about the future and feel that he is more on track to achieving his full potential and experiencing a life rich in meaning. Some initial coaching strategies would include raising awareness about how his relatively low scores in Emotional Expression, Flexibility and Happiness are related. For example, with an improved ability to articulate his inner feelings to others, a deeper level of dialogue and insight may emerge, which could open up new perspectives and strategies to address issues that may be personally troubling at this moment in time.

Case Study 2

Submitted by: Marcia Hughes

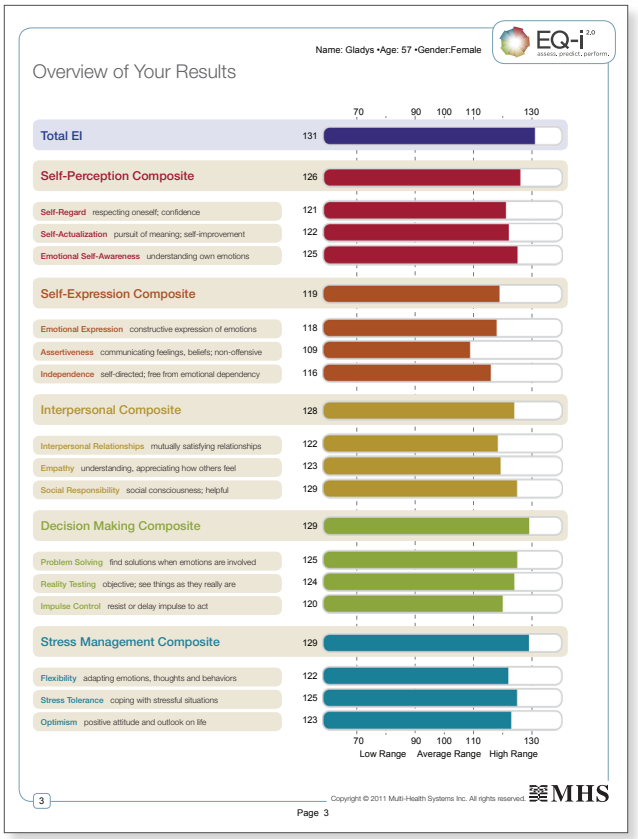
Client Background

Gladys is a 57-year-old attorney with a successful track record of building relationships that have resulted in collaborative decisions for resolving community challenges. She has served as a community organizer and has been recognized for her leadership through many awards. Gladys is a positive and upbeat person, someone others come to for support and to renew their energy. She is married, actively volunteers, and is regularly seen at economic development forums, shepherding seniors to special lunches and taking family members to events. Gladys is reliable. As a result of her optimism and overall zeal, it has come to be expected that Gladys is overtly affirming of those she encounters and will openly and enthusiastically greet those she is in connection with, from business colleagues to friends. She grew up in a tough neighbourhood and attributes her skills to good parenting, having excellent role models who emphasized the necessity to give back to the community, and an excellent education that empowered her to change her world.

According to Gladys, much of her life is great, but there are circumstances that prove challenging to her and test her EI skill development. For example, Gladys has identified challenges with a cousin who has a difficult personality and needs an unusually high level of support, coupled with her own challenges of a recent marriage to a husband who works a great deal. Both of these circumstances were identified by Gladys as valuable areas to explore in our EQ-i 2.0 debriefing.

Summary of EQ-i 2.0 Results

The results of the EQ-i 2.0 indicate that Gladys has excellent overall EI skills. Her profile indicates a wide range of abilities, with scores ranging from 109 in Assertiveness to 130 in Social Responsibility. Her positive impression and negative impression scores were acceptable, while her response style was consistent. Gladys indicated she answered questions openly and honestly. With such high scale scores and strong validity, the place to find opportunities to work with her strengths and challenges would be found in her specific item responses. Overall, there is good balance between her skills, although



the difference between her lowest, Assertiveness (109), and her strongest, Social Responsibility (130), is large enough to warrant attention. Most of the time Gladys responded to the EQ-i 2.0 using a 1 or 5, suggesting all-or-nothing responding or absolute thinking. Thus, when she answered with a lower score, it helped in finding the specific areas that challenge her.

Coaching Approach & Development Strategies

Gladys wanted to discuss some concerns with individuals, such as her cousin and the relationship with her husband, in connection with her lowest score, which was Assertiveness. She exclaimed she just couldn't imagine being more assertive as she is quite outspoken; yet she admitted that she's received feedback that it would behoove her to increase her assertiveness. We explored the apparent contradiction—is she assertive or not? Gladys is quite happy (120), highly empathic (123), and is inclined to take care of others. We found that one low score in Emotional Expression ("When I'm sad, I talk to people about it") and another in Assertiveness ("I say 'no' when I need to") combine to demonstrate her challenge with Assertiveness. Although Gladys does speak up frequently, enthusiastically and effectively, when she needs to suggest a correction or disagree with someone and knows that it will be hard on the other person, she often softens her message, rescuing the other person from the discomfort. Her own message loses power! Gladys does not tell people when she is sad as they expect her to be the upbeat person who lifts them up. Keeping up the positive face all of the time can be exhausting.

Providing difficult assertive messages is not in accordance with the uplifting role Gladys is thoroughly identified with. However, through coaching, Gladys realized that she does not want to give her power away and that it can be considerate to tell the truth—provided the truth is said with regard—even if the message is not welcomed at first. Gladys developed an acronym to guide her behavioral change process: AS – Ask, Stop. Ask, allows her to make a request while permitting the recipient an opportunity to respond and work through it. She intends to make the request without softening it to the point of losing her own message. Stopping is even more of a new strategy for her. Gladys is committed to no longer rescuing the listener from the discomfort of the message. She will stop and allow silence, whether for a minute or two in a conversation or for days if the matter requires more time. As a continuous learner, she is eager to start applying her new skills.

In summary, the key steps we took as a part of this coaching process were:

- Identify current life situations that are problematic. This step is critical to keeping the discussion practical, and sufficiently concrete, to invite lasting behavioral change.
- Tying change to challenges and strengths as identified by the EQ-i 2.0 results is important to remember. Strengths as they appear are often a person's greatest point of leverage. While discussing key responses in the report, such as her difficulty in saying no and the difficulty in telling others about her challenging emotions, we began tying those answers to her identified problem scenarios. From this specific discussion, we expanded our conversation to a more global discussion of how these behaviors can cause unfavorable results.
- Brainstorm together about ways to make changes. Here, through a trial and error discussion of possible actions, Gladys exuberantly developed her AS strategy. Because she developed it, she is more likely to employ it and make real changes.
- Finally, we discussed specifics about applying the change in her responses. She will use the new process as needed, while also taking time at the end of the day to review her responses and notice how well her responses worked for her. Building the process of reflective self-awareness is tremendously valuable. We talked about her learning as she reflects on this change and then continuing to build her reflective skills as she considers her interactions more broadly. Gladys intends to keep using this AS strategy so it won't stop after her initial excitement with the strategy.

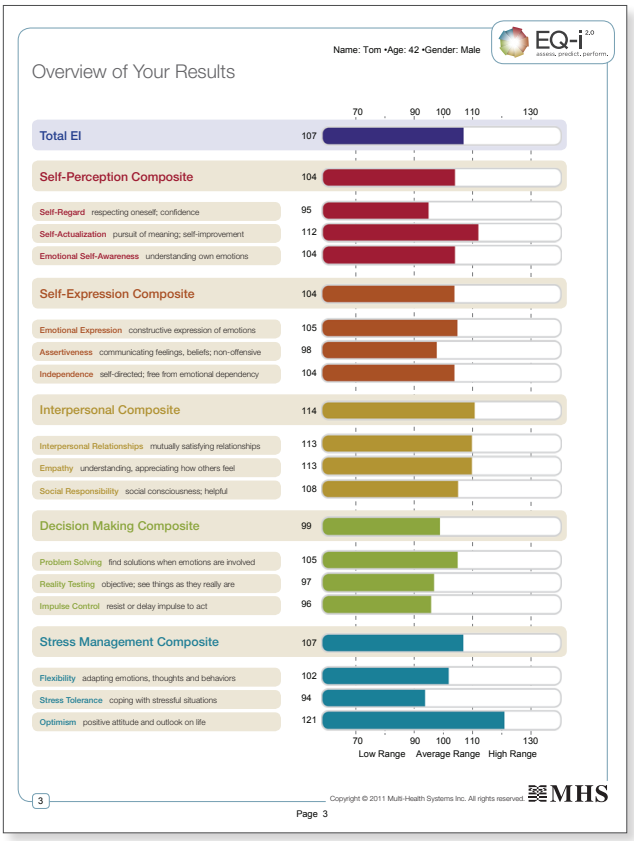
Case Study 3

Submitted by: Dana Ackley

Client Background

Tom is a 40-year-old husband and father of two. Tom is a professional with an advanced degree, who works as a senior executive in a not-for-profit organization, leading a team of five colleagues. Tom has a solid history of success working within organizations. When he attempted to begin his own business, his success was adequate but not outstanding. He found that he missed the connectedness that he felt working for an institution. He returned to his current employer, who asked him to turn around a department currently in disarray.

Tom described himself as highly optimistic with lots of positive emotional energy. He saw himself as skilled in creating harmony within his work team. He succeeded in turning the performance of his department around by using his high level of positive energy and genuine enjoyment of people. However, Tom was also able to articulate limitations in his approach. He said: "I don't do well with conflict. When someone disagrees, I nod but don't raise my concerns." He took the EQ-i 2.0 in order to identify barriers to managing conflict, having tough conversations and making use of "teaching moments."



Summary of EQ-i 2.0 Results

All of Tom's EQ-i 2.0 scores are average or better, consistent with the success he has had in his career and as a leader. While he does not have any low scores, the differences that exist among scores shed light on his strengths and opportunities.

His self-description was highly consistent with his EQ-i 2.0 profile. The Interpersonal Composite shows strong interpersonal skills across the board. He is good with people. His high scores on Optimism and Happiness speak to his ability to create high levels of positive energy that draw others to him, creating a positive context within which he can lead and influence people.

Consistent with his report of difficulty with conflict, Tom's scores on Assertiveness and Self-Regard are relatively low. To avoid conflict, he too often puts others' wishes ahead of his own, rather than strive for a functional balance. This pattern has an erosive effect on Tom's Self-Regard.

His relatively low score on Stress Tolerance signals the anxiety he reports during conflict. Impulse Control is also relatively low, consistent with anxiety impacting decision making about what to do when faced with conflict. Interestingly, once Tom gets some distance from the event, he begins to think more clearly, using skills consistent with his high score on Optimism. Instead of staying anxious, he begins to think in resilient ways. He thinks about possibilities instead of barriers.

In discussing his positive attitude, he noted "I can be kind of myopic sometimes." This reflection is consistent with his relatively low score on Reality Testing. He tends to wear rose-colored glasses, missing signs that might warn him that a conflict may be on the horizon. He doesn't want to see conflict because he has little confidence in his ability to handle it.

Tom has devoted himself to self-development in many aspects of his life. He spent years in foreign countries to learn their languages and cultures. He earned a professional degree for the intellectual development it offered. His high Self-Actualization score is consistent with that history and predicts a positive response to attempts to build EI skills that need attention.

Coaching Approach & Development Strategies

Clearly, Tom needs to become more assertive. And he knows it. His barrier has not been that knowledge. Instead, he had not recognized the role that anxiety plays in the process. Review of the EQ-i 2.0 profile helped identify the sequence of denial, recognition of conflict, anxiety, and then retreat. Before he can be more assertive in conflict situations, Tom needs to learn to manage that initial anxious response. Discussing the

profile provided us a context within which we could identify the roots of his anxiety over conflict. "Connecting the dots" often removes much of the power of past experiences.

Learning the role of anxiety in his conflict avoidance motivated Tom to build his Stress Tolerance skills, especially within conflict situations. Exercises in the *EQ Leader Program Manual* (Ackley, 2006) were provided. Once he has built those skills, he will be ready to learn better Assertiveness skills. With the anxiety under control, that is likely to happen fairly quickly for someone with this man's overall EI skills. And when Tom is ready to focus on Assertiveness, a variety of exercises can provide the necessary framework for development. It is quite likely that as he improves in his ability to manage conflict, his Self-Regard skills will improve largely on their own because he will have better balance in seeing to his needs and those of other people.

Case Study 4

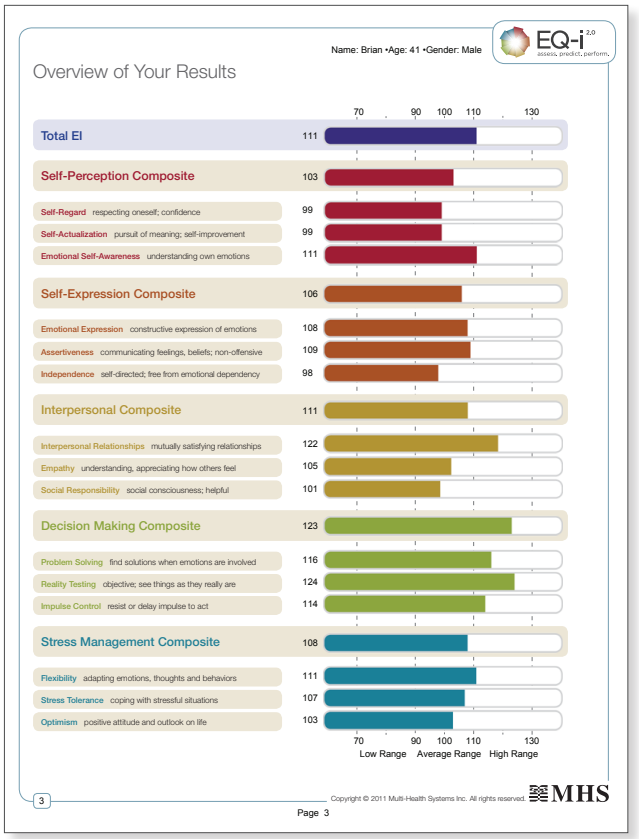
Submitted by: Hile Rutledge

Client Background

Brian is a successful 41-year-old executive newly hired to a consulting firm that works exclusively with the United States Department of Defence. Most of the people now reporting to Brian are Ph.D. researchers, 10 to 25 years his senior. Given Brian's age, his lack of an advanced degree (he has a Bachelor of Arts in History), and his inexperience with advanced research projects, he feels at times stressed by his senior-level position and its demands. Will today be the day that everyone learns how far in over his head he is? This internal query is one that plays in a continuous loop within Brian's head. Seeing the EQ-i 2.0 as an opportunity to sharpen his self-awareness and relationship building skills, Brian eagerly engages in the EI process.

Summary of EQ-i 2.0 Results

To make the EQ-i 2.0 feel less like a report card and more like the spur to a deep, data-driven discussion about self-awareness and self-management, the first step in the feedback process is to define the various elements of the EQ-i 2.0 model by having Brian do a self-assessment as to how often, easily and consistently he engages with each element in his daily life. Low engagement could reflect low skills, but it could also reflect adequate skills in an area seen as unimportant and often ignored. High engagement could reflect enhanced development and high skills, but it could also indicate over-engagement and a quality or behavior that is over-done or often too intense. Average engagement means the element is used, or paid attention to, about as much as it is with most people. Average engagement with an EQ element means



that there is certainly room for improvement and growth in that area, but there is nothing in average engagement that means that development is required or that this is in any way a liability.

Brian predicted high levels of engagement with Interpersonal Relationship, Reality Testing, Problem Solving and Emotional Self-Awareness; and low engagement with Self-Actualization. All other elements he felt well connected to, but not in a way that would distinguish him from anyone else—so about average. With this self-assessment complete, Brian was now ready to receive and fully understand his EQ-i 2.0 report. Brian's highest scores—Reality Testing and Interpersonal Relationship and Problem Solving—were not a surprise, but his connection to the EQ-i 2.0 process got a boost from his being able to predict his attachment to these elements.

After noticing these high scores, Brian's attention was then pulled to some of the lower scores on his report, which did surprise him. Self-Regard and Self-Actualization were among the lowest scores on his report, and while they were (at 99) just under the average, he was surprised by seeing these important elements at the bottom of his line-up. In the discussion that followed, Brian came to realize that in his new environment, in which he was leading so many people a good bit older than he, with technical expertise and degrees he did not have, that he was relying on his ability to connect personally and relationship build as a means of management and decision making. And while Brian did this with great frequency and ease, he had a low-boiling fear that he had not pursued

enough formal education (in the form of a graduate degree) and/or amassed more research expertise. These fears were evident in his lower Self-Regard and Self-Actualization scores, creating a greater sense of awareness about his otherwise perceived confident and accomplished sense of self.

These realities were adding a new kind of stress to Brian's professional life, which brought on the biggest surprise of all—a Happiness score that would put him around the bottom third of respondents in Happiness. Long self-described as a happy and funny man, Brian was feeling increasingly disconnected from this personae, and he decided to take steps to correct this disconnect.

Coaching Approach & Development Strategies

Brian decided to use his EI strengths (Interpersonal Relationships and Decision Making) to help him reframe and better engage the EI elements with which he most often struggled—Happiness and Self-Actualization. He decided to reach out and create a close professional relationship with a senior researcher who works for him who will serve as a mentor of sorts, helping to build the specific content knowledge that Brian may lack. The action steps Brian derived utilized his relative strengths while enhancing his lesser-engaged elements and moved him effectively and quickly from insight to action.

Case Study 5

Submitted by: John Elliot

Client Background

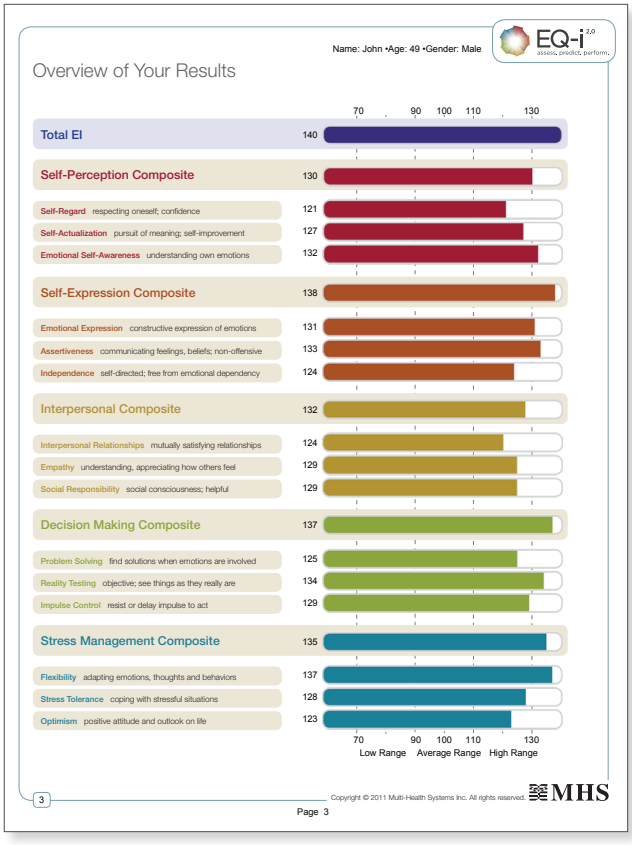
John is a successful senior manager. His personal style is poised and pleasant, characterized by high initiative and self-confidence. In general, he is highly regarded by upper management, direct reports and peers. John is extremely articulate and has no problem making himself understood in our discussion. He expresses a tendency to "shoot from the hip" on occasion in his leadership style. However, insight he gained from a recent 360º feedback indicated that his staff saw him as caring and fair. In addition, he is very goal oriented, conscientious and dependable. John describes himself as someone who is comfortable with his influence and demonstrates acute mental agility which helps him develop unique approaches to problem-solving. John indicated that he is able to meet challenges head on and is not intimidated by change and uncertainty that are constants in his work. He indicated that his very strict family upbringing was instrumental in shaping him. He has a sense of right and wrong and is very emphatic in his willingness to only choose what, in his mind, is right. He said that shades of grey are not part of how he sees his world.

John indicated that he started off his work-life as a plumber, but at the age of 34 made a decision to go to university full-time while raising a young family. He was interested in creating a better future for himself and his family that would be afforded by higher education. He indicated that his careful planning was rewarded when he earned a position with a private sector company. He eventually moved into more senior positions with increasing responsibility.

Summary of EQ-i 2.0 Results

John's scores on the five composite scales were all in the high range. In addition, the subscales were in the high range, indicating someone with a mastery in their emotional skills and the ability to fully understand oneself and use this information to manage emotions productively.

In reviewing John's results, it was noted that his response style for positive impression was elevated. It was explained to John that this response style may affect the profile's accuracy and that we needed to discuss the way he responded to the items. John explained that this is not uncommon for him and that he interprets the questions in a logical and precise way; in no way did he feel that his responses were misrepresentations about how he views himself. He used the example of high Self-Regard to clarify this point, indicating that his upbringing



and the way he has lived his life has reinforced a high degree of confidence and self-respect. In addition, John indicated that his high moral code, integrity and authenticity matter very much to him. John feels that his responses truly present how he views himself.

John further indicated and recognizes that he has room to improve and that he is willing to strive towards personal improvement. He was most interested in the Interpersonal composite scores. He recognized that in his work setting his particular style does not meet the needs of all of his staff. He has been working on developing a more open approach to discussing differing points of view. He was aware of his tendency to make snap decisions (Impulse Control) and that it often isolates those he works with, leaving them to feel invalidated and misunderstood. As a result, John is committed to consciously improving his approach in this area.

Coaching Approach & Development Strategies

Even though John presented well and was adamant that he did not appraise himself higher than he thought he should, he was still willing to look at possible areas to develop. John indicated that the key to his success as a manager is the success of his staff. He wanted to use the insight gained from the EQ-i 2.0 to help him develop his interpersonal skills. He knew that he was extremely self-aware; however, he recognized that he needed to engage his staff to ensure that he was more inclusive as a manager. It was recommended that John develop a facilitative leadership style by developing a repertoire of neutral questions to promote engagement and enhanced communication. This exercise would help John to develop open and effective communication with more emphasis on listening and less of a need to expedite and solve his staff's problems. I asked him to pay close attention to body language: his body language and that of those he interacts with. The goal is to reframe, moving away from becoming irritated and more toward becoming curious so he could engage, probe and let his staff explore how they felt. Some feedback in the past indicated his disregard for their feelings in particular situations; this change in behavior will help him address these concerns.

John is committed to providing better communication with a new perspective on his behaviors and how it impacts others. I asked John to chronicle his interactions in a journal so he could review and make adaptations to his leadership style. John agreed that journal writing would allow time for reflection/integration during the course of his day. John was asked to think of the following question when interacting with his staff, "What action can I take to ensure my staff feel listened to?"

Case Study 6

Submitted by: Kelley Marko

Client Background

Eight years ago, John left a senior executive position in a large natural-resources company and accepted a demotion to work in a Fortune 500 services organization. This life-changing decision was influenced by two factors: his desire to reduce his unreasonably long hours at work so that he could spend more time with his wife and young children, and a significant health scare that was directly related to the overwhelming stress he experienced at work. Over his eight-year tenure with his current organization, John has continued to prove his value. Now, at the age of 46, and several promotions later, John is once again occupying a senior executive position.

John's organization has been affected by an economic downturn. This has significantly raised the level of stress and anxiety throughout the organization at being able to achieve targets and meet plans. As a result, the Executive team has been focused on short-term results and cost cutting in an attempt to satisfy the company's shareholders. This orientation has resulted in decisions and behaviors that are fuelled by the pursuit of quick fixes that often come at the expense of engaging teamwork and leadership, even though the organization promotes the importance of these concepts through its published values.

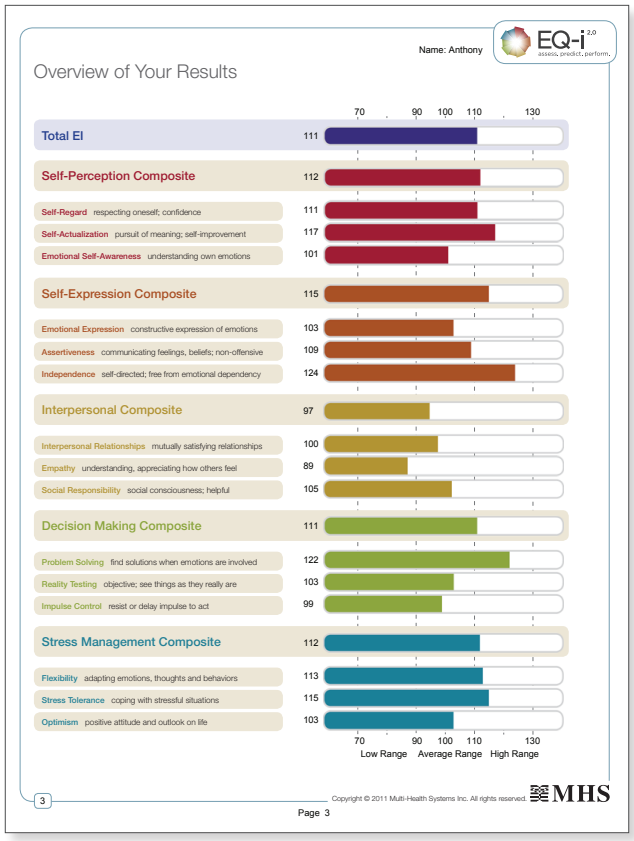
In light of this development, John now feels the pull to return to his old and unhealthy ways of leading and managing. In an attempt to preserve his well-being and prevent his career from once again becoming derailed, John has engaged me as his executive coach to assist him in balancing the short-term needs of the company with his long-term desire to be a better leader.

Summary of EQ-i 2.0 Results

John's relatively lower score in Impulse Control is a particularly compelling aspect of his assessment. When considered in relation to some of his highest scores, the relative imbalance proved to be particularly problematic but also insightful. John recognized that he had a hard time working with and understanding people who were not of the same skill level or mindset. For example, his significantly higher Independence, Flexibility and Problem Solving would sometimes mean that he would be several steps ahead of others and would have a harder time understanding why other people were not at the same stage he was at or why they could not keep pace. As a result, he would sometimes "leave others behind" in his desire to impulsively and quickly get things done. Understanding how his own high scores sometimes resulted in unrealistic expectations of others, who may not be at his level, was a key

leverage point that assisted John in developing more Empathy for those he was attempting to lead. Through this process, John gained a deeper understanding of how to better manage his behaviors "in context" and that misusing his strengths can become equally problematic in certain situations.

In conclusion, John's EQ-i 2.0 assessment, in conjunction with an in-depth understanding of his current work and a detailed debrief and coaching session, allowed us to consider the multiple aspects and interrelated perspectives that would assist him in better aligning his behaviors with his intentions. The EQ-i framework also provided a common language, for both myself (the Coach) and John, to label these dynamics and work with them in a more intentional way as we moved forward with ongoing coaching and leadership development.



Coaching Approach & Development Strategies

Gaining an in-depth understanding of John's current work and life environment through discussions and focused questions was the critical first step to moving forward with our coaching relationship. This step not only helped me better understand John's wants and needs but also provided a foundation for better understanding his EQ-i 2.0 results in context.

An analysis of his results in conjunction with a private and confidential debrief and coaching session revealed several important revelations that provided a clear focus for our coaching relationship:

- *Establishing John's Orientation to the Difficult Work Required for Leadership Development:* John's results indicate an orientation towards deep introspection and an ability to remain accountable to his own personal development goals and commitments. First, a significantly high score on Self-Actualization confirmed John's authentic desire to continue to develop personally and interpersonally and we linked this focus on self growth to his current desire to seek out coaching. Second, John's high score on Self-Actualization coupled with significantly high scores on Happiness and Stress Tolerance provides evidence that he is an excellent candidate for the tough personal work involved as part of his development. These are strengths that he can rely on to help keep him on track to achieving his personal goals. Third, John's significantly high Independence provided the foundation he needed to stand behind the belief and value he placed on executive coaching, even when other executives in the organization interpreted this type of support as a sign of weakness or an unnecessary expense in tough economic times.
- *A Need to Align Intent with Behavior in His Relationships:* John's above-average Social Responsibility score is a confirmation of his personal desire to have a meaningful and sustainable impact on others and to not just focus on short-term or quick-fix perspectives that often come at the expense of people. This mindset also helped to explain some of the significant tension and dissonance that he is currently experiencing, given the decisions and behaviors of his Executive team. Despite John's above-average score on Social Responsibility, his Interpersonal Composite was his lowest-rated theme. When we further explored the impact of John's relatively lower scores in Empathy and Interpersonal Relationships, it revealed how his desire to be a more effective leader did not always align with his behaviors or how he is perceived by others. This disconnect was something particularly insightful for John. Given that his current business environment is characterized by high stress and anxiety, John needed to engage the skills comprising the Interpersonal Composite now more than ever. Through the use of the EQ-i 2.0, re-aligning John's behaviors with his intentions became a developmental priority in our coaching. Although the Interpersonal Composite proved to be a primary focus, further analysis of his results revealed why maintaining balance was particularly difficult for him to do and what else he needed to focus on in our coaching.

- *The Cost of Being High in Certain EQ-i Scores when Combined with Lower Impulse Control:* John acknowledged that he has a tendency to take on too much and this tendency is sometimes fuelled by impulsively overusing his Independence. We explored that when John does this, he fails to develop and build relationships with others, as well as he could, and in turn fails to delegate responsibilities when needed. These factors were ultimately leading to a recurring pattern of behavior from his past of working long hours and taking on an unhealthy amount of stress. Given that John's Stress Tolerance is well above average, he often failed to recognize when he had taken on too much, both for himself and for others.

Case Study 7

Submitted by: Katie Ziemer

Client Background

Heather, a 33-year-old female executive assistant, completed the EQ-i 2.0 as part of an exploration exercise to guide decisions about whether or not to make a career change. In past conversations, this client has expressed excitement over several new career options in response to her discontent with her current role. She has been in an administrative role for most of her professional life but is recently questioning whether her career truly plays to her interest: directly helping people.

Prior to taking the EQ-i 2.0, the client shared that she would like to know more about where her strengths lay in order to make a more informed decision about what career change is best.

One aspiration that she discussed before completing the EQ-i 2.0, was to take a more entrepreneurial course in her career and start her own business.

Summary of EQ-i 2.0 Results

Heather's profile graph reveals some interesting areas of both strength and opportunity. In a previous conversation, the client had mentioned that she feels like she copes well with the demands of her job but feels she has much more to offer, particularly when it comes to working with people. Her above average result on Empathy (118), Interpersonal Relationships (108) and Emotional Expression (131) seem to support her feelings of "wanting a job that puts her in close contact with people and allows her to truly help others."

Reality Testing and Problem Solving are two areas that present as potential derailers should she seek her own business. Low scores in Reality Testing (76) and Problem Solving (73), coupled with both of these subscales being 30 points lower than Impulse Control (108), suggest a tendency for Heather to be delayed or paralyzed in decision making. Although generating exciting ideas may not be a problem, creating realistic plans to execute her ideas may be problematic. This concern is reinforced through her response of "occasionally" to the Reality Testing item "creating realistic plans to achieve goals." Heather's result in Independence, particularly her mid-range responses on items such as "I am more of a follower than leader" and "I find it hard to make decisions on my own," suggest that while she likely has no shortage of great ideas, her ability to execute and follow through on them might be compromised, particularly if she is in a role where she alone has to react quickly to environmental demands and pressures.

Heather also presents with a Flexibility score that is higher than most other subscales on the EQ-i 2.0. As a result, Heather may appear to be less practical or pragmatic in her career decisions. Her Flexibility score coupled with low Reality Testing and Problem Solving interact in a way that may leave her susceptible to her high emotional investment/interest in a new direction without a realistic evaluation of whether she can indeed follow through with a given direction.

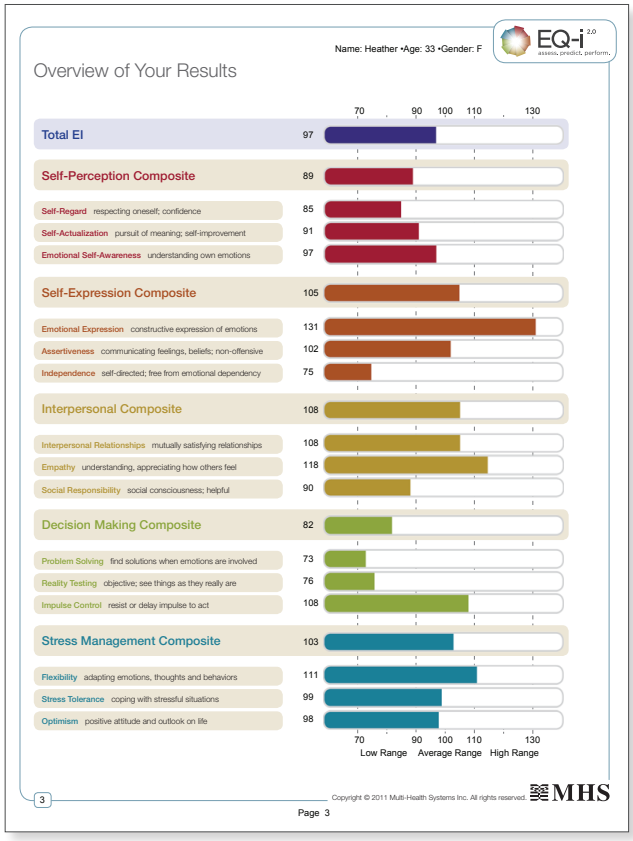
Coaching Approach & Development Strategies

The recommended coaching approach would be to set aside deciding on a career (which has likely spawned from her excitement to try something new without the realistic assessment of what a career change entails) and concentrate on two developmental areas:

- Gaining a clear understanding of her strengths and weaknesses
- Working through different decision making techniques and processes

Rationale

Her response was that she only "sometimes" has a good sense of her strengths and weaknesses. There are clear subscales that could be strengths for her (i.e., Empathy [118], Emotional Expression [131], Flexibility [111] and Interpersonal Relationships [108]) where she may benefit from further understanding and realization. It may help her to examine real situations in her current role where she excelled in these areas and those outside of what the EQ-i 2.0 measures. She may need assistance in this activity because her slightly lower Self-Regard may lead her to being overly conservative in her evaluation of her capabilities.



Building on this process, she may benefit from being introduced to some techniques for making decisions independently, including setting realistic goals and mapping out an action plan for achieving them. Although these should be small and short-term goals, they should be coupled with gathering more information about career options, and even completing additional career interest inventories. The crux of this developmental exercise would be for her to follow through on, and hold herself accountable for, completing an action plan for reaching these goals. She may need to watch her tendency to be overly expressive and that her emotions don't overrule or overshadow an objective evaluation of a situation (i.e., extreme excitement about the idea of starting her own business versus how much commitment and follow through will be needed to get a start-up company off its feet).

Case Study 8

Submitted by: Derek Mann

Client Background

Johann is a 39-year-old former national collegiate tennis champion, retired Association for Tennis Professional (ATP) touring professional, small-business owner, head tennis coach, husband and father, striving to achieve a work-life balance. Johann completed the EQ-i 2.0 as part of a self-development process that he has undertaken in response to the trials and tribulations he faces as a coach and professional in his community. Johann is a prominent figure in his community and is renowned for his positive demeanor, willingness to lend a helping hand, going the extra mile to help his students achieve their goals (even at the expense of his own goals), and personal and financial well-being.

Despite having a career driven by his passion, Johann is unhappy with the day-to-day operations of running his business, which he feels detracts from his passion of coaching and mentoring young athletes. However, even while coaching, Johann has recently found himself confronted with the challenges of helicopter parents and athletes with a below-average work ethic and above-average expectations. Unfortunately, Johann doesn't challenge the status quo or voice his concerns until his back is against the wall.

Summary of EQ-i 2.0 Results

Overall, Johann's total emotional intelligence score is low (90) and although this score in itself presents an opportunity for development, there are also several implications of his low Total EI score reflected at the subscale level, which impacts the process by which he addresses and copes with his day-to-day challenges. As a result, the true opportunity for Johann lies at the subscale level and the interactive effects between his relative strengths and weaknesses. Table 11.1 highlights some of the key relationships addressed during Johann's coaching and development.

Table 11.1. Key Interactions Explored

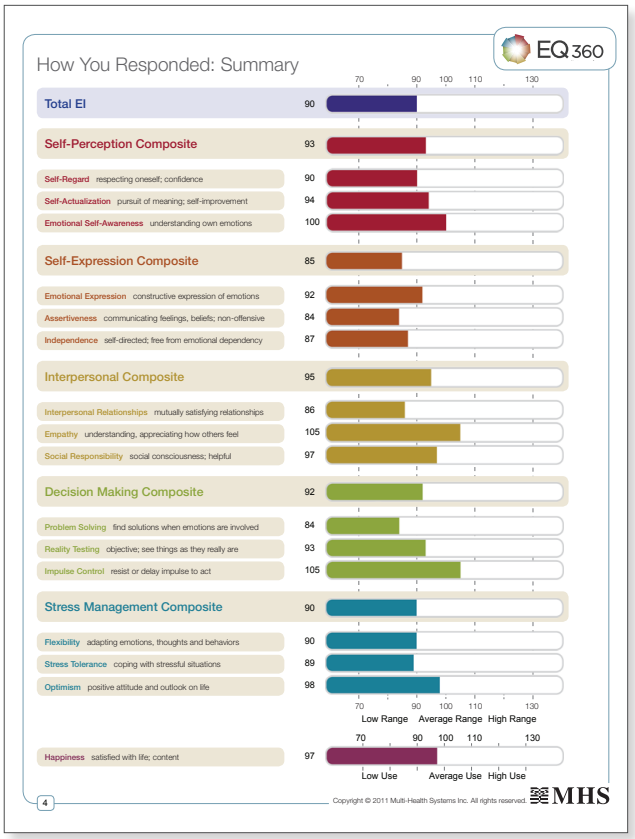
Key Relationships					
Subscale	**Score**	**Subscale**	**Score**	**Subscale**	**Score**
IC	105	EM	105	ESA	100
FL	90	ESA	100	RT	93
ST	89	RT	93	EE	92
AS	84	EE	92	ST	89

In this case, despite Johann's Impulse Control (105) falling in the mid range, it is one of his "relative" strengths. Given his level of development, remaining resistant to temptation while not being overly reactive is a strength for Johann. Although addressing Impulse Control in isolation is a good starting point, it is equally important to take into account the interactive effects of Impulse Control. Of particular interest in this case was the interaction of Impulse Control with Flexibility, Stress Tolerance, and Assertiveness. Collectively, this combination of results indicate that Johann is not only adept at tempering his reactions, but this combination of skills might suggest that he is overly guarded, resistant to change, and in some cases, inflexible. During the feedback session, this hypothesis was explored.

Johann's initial reaction to the probing questions during the feedback process was initially surprise, followed by thoughtful reflection. As the conversation evolved, Johann realized that although as an athlete he was open to new ideas and loved to be challenged, as a coach he feels much more vulnerable because such change implies incompetence.

Johann's Empathy (105) is complimented by his relative strength in Emotional Self-Awareness (100). This combination of skills suggests that Johann is not only able to relate to the plight of others, he can also understand how the positive and negative emotions of others can impact his own emotional state. The difficulty for Johann lies in the combination of low Reality Testing (93), coupled with his lower Emotional Expression score (92), suggesting that Johann may misperceive the gravity of a given situation and incompletely or inaccurately express (verbally and nonverbally) how he is feeling.

While Johann possesses the ability to understand how he feels and why, it is likely that his Emotional Self-Awareness (100) coupled with his low Stress Tolerance (89) may account for



why he often feels overwhelmed by the day-to-day interactions with the parents and athletes he coaches. For the most part, Johann feels stressed and is very aware of these feelings. The difficulty for Johann is that he either lacks the necessary skills or confidence in his skills to adequately cope with or modify a given situation.

Coaching Approach and Development Strategies

Collectively, Johann's three personal strengths have shed light onto several development areas. In many cases, these development areas are directly related to the professional challenges Johann communicated prior to completing the EQ-i 2.0.

Given the relatively low scores across Johann's profile, a combination of the model approach and narrative approach (see Chapter 9 & 10) to feedback was used to help engage Johann in the feedback process. The model approach helped to minimize the sting of the relatively low profile, while the application of the narrative approach allowed Johann to move freely through his results.

Post feedback, Johann had agreed to work on three key areas of emotional intelligence development. To provide structure to the coaching and development process, energy was directed toward the Self-Regard, Reality Testing, and Assertiveness subscales.

Self-Regard. Although Self-Regard is not among Johann's lowest scores, it is sufficiently low to warrant attention, given that a healthy sense of self is fundamental to effective emotional and social functioning. As a result, the first step to helping Johann enhance his sense of self included conducting a Self-Regard inventory. Johann was engaged in an extensive process where he created a list of his strengths and areas that he believed needed development. Once he identified what he believed to be his areas of strength, he was encouraged to leverage these strengths whenever and wherever possible. Johann was also encouraged to meet with several friends, family members, and colleagues with whom he felt comfortable to explore what he believed to be his weaknesses.

The second step to helping Johann with his self-regard included setting specific individual goals while also setting collaborative goals with each of his athletes. By doing so, Johann was better equipped to manage both his expectations and the expectations of his athletes. In many cases, Johann developed specific, measurable, and action-oriented goals, and when necessary he further broke down his goals into smaller mini-goals.

Reality Testing. Johann is perceptive, but he has the tendency to misinterpret cues, which has often resulted in Johann feeling stressed, overwhelmed, and frustrated. Johann needed to better understand how to validate the information to which he was attuned. Johann's responsibility was to identify three specific people from the groups he outlined above with whom he felt truly comfortable. During regular interactions, Johann was to describe the context of a given situation, what he perceived to be happening, and the emotional tone and implications of the situation. This process exposed Johann to the gaps he was experiencing in many of his interactions.

Assertiveness. During the coaching and development process it became very clear that Johann's discomfort with voicing his opinion and standing behind his decisions, or in many cases remaining passive in the face of a disagreement with a parent or athlete, was deep rooted in his low self-regard. Coupled with the above mentioned process for helping Johann improve his sense of self, Johann worked on expressing a variety of thoughts, ideas, and feelings while learning that being expressive is perfectly acceptable, provided that the delivery is non-offensive and non-destructive. In fact, learning to be more assertive and expressive was crucial to his success.

Placing emphasis on Self-Regard, Reality Testing, and Assertiveness during the initial coaching period provided the necessary skills to help Johann begin to realize the opportunities that lay ahead. It also helped provide the foundation for future coaching to enhance the coping skills that Johann needs to be truly effective and happy with his day-to-day responsibilities.

Case Study 9

Submitted by: Deena Logan, Derek Mann, Katie Ziemer

Client Background

A large U.S. based pharmaceutical company was interested in identifying their sales representatives' strengths and development opportunities. Despite having a well-developed and established competency model, this organization was particularly interested in the added insight made available by completing the EQ-i 2.0.

A sample of 137 sales representatives agreed to complete the EQ-i 2.0. Sales representatives were also evaluated by their respective manager or supervisor on each of seven competencies: Market and Therapeutic Knowledge, Selling the Portfolio, Building and Sustaining Valued Partnerships, Analyzing, Prioritizing and Planning, Executing, Evaluating and Adjusting, EQ-Related Behaviors, and Overall Performance. Sales representatives were rated on their performance relative to the other sales representatives in their unit, on a 5-point scale from "weak" to "best."

Summary of EQ-i 2.0 Results

Collectively, the sales representatives have a Total EI score of 117, suggesting, on average, a high level of emotional and social functioning across team members. The same result holds true across the five composite and subscales with average scores ranging from 108 (Independence) to 116 (Self-Actualization). Considering that only 25% of the EQ-i 2.0 normative population score above 110, these scores suggest that this group is equipped with effective emotional and social functioning skills. Specifically, the Self-Perception (116) composite and the Interpersonal (116) composite results indicate an inner strength, confidence, and personal drive while maintaining the ability to develop and maintain relationships based on trust and compassion; two attributes that are integral to sales success.

However, when considering the collective results of individuals, there is a tendency for top and bottom performers to washout in the averaging process. As a result, to truly understand the impact that emotional intelligence has on the performance rating of these sales representatives, it is helpful to divide the sample into groups of performers based on performance ratings (in this case provided by managers and supervisors). For each of the competency areas outlined above, the sample was divided into thirds, in order to compare the top and bottom performers on the EQ-i 2.0 scales. A number of significant differences in EQ-i 2.0 scores were observed between groups, demonstrating a relationship

between emotional intelligence and performance. Group means and Cohen's *d* measures of effect size are described below for each competency.

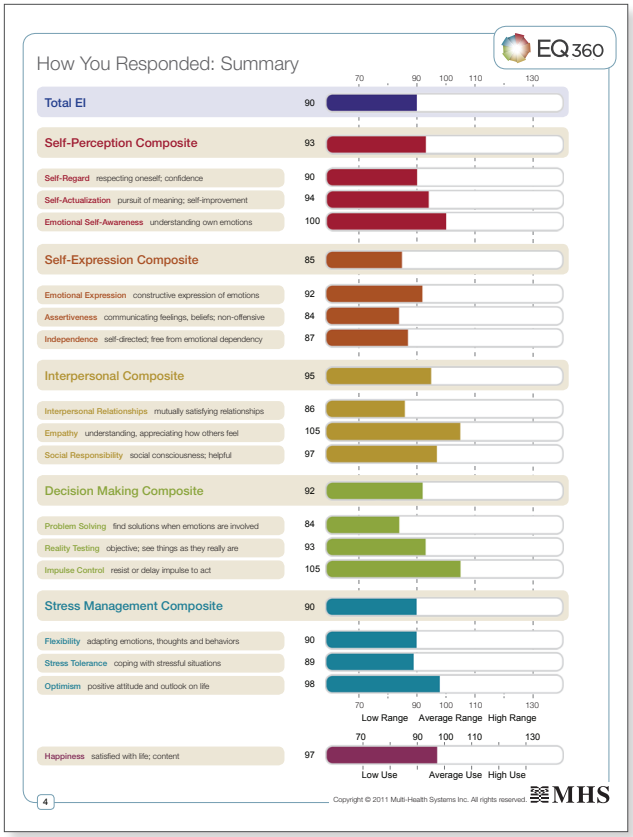
With regard to Market and Therapeutic Knowledge, the top performance group scored higher than the bottom performance group on Impulse Control (M = 114.75 vs. M = 108.73, d = .47), as well as on the Decision Making composite (M = 117.14 vs. M = 112.26, d = .43).

For Analyzing, Prioritizing, and Planning, the top performance group showed lower scores compared to the bottom performance group on a number of EQ-i scales, including Emotional Self-Awareness (M = 110.02 vs. M = 116.34, d = .48), Emotional Expression (M = 112.54 vs. M = 117.90, d = .49), Interpersonal Relationships (M = 111.61 vs. M = 115.56, d = .49), Empathy (M = 111.74 vs. M = 117.64, d = .56), and the Interpersonal composite (M = 113.23 vs. M = 118.74, d = .58).

For EQ-related behaviors, the top performance group scored higher than the bottom performance group on Impulse Control (M = 114.80 vs. M = 106.78, d = .56), the Decision Making composite (M = 116.92 vs. M = 111.49, d = .41), and the Stress Management composite (M = 116.20 vs. M = 111.63, d = .47).

Concerning overall performance, the top performance group scored higher than the bottom performance group on Impulse Control (M = 114.43 vs. M = 108.55, d = .45).

Most notable among these results is the relationship between Impulse Control and the areas of Demonstrating Market and Therapeutic Knowledge, EI-related behaviors, and Overall Performance. Salespeople are hungry for that next opportunity, but individuals with strong impulse control are better able to resist the urge to make quick promises or rush into providing a solution for a customer when their needs are not yet fully understood. Those with high impulse control tend to ask questions first rather than overreacting to negative emotions or relying on assumptions.



Also notable is the inverse relationship between Analyzing, Prioritizing, and Planning and a number of EQ-i 2.0 scales in the Self-Perception, Self-Expression, and Interpersonal areas. This pattern is not uncommon with sales-type roles. While these skills are of course necessary and can be advantageous for someone in a sales position, an overemphasis on such behaviors can have certain drawbacks. Becoming too heavily focused on emotions and relationship maintenance can cause one to lose sight of the task at hand, and other job requirements can suffer as a result. Being overly empathic can make it difficult to remain objective and prioritize tasks appropriately when strong emotions are involved, and cause one to avoid making tough decisions or dealing proactively with important client management issues. Furthermore, too much self-reflection can lead to feelings of insecurity in one's abilities, and expressing such feelings too freely might make one appear incompetent, with the result that others may lose confidence in that person as a sales professional.

No significant differences in EQ-i 2.0 scores were observed on three of the scales, namely Selling the Portfolio, Building and Sustaining Valued Partnerships, and Executing, Evaluating, and Adjusting.

The fact that the top and bottom performers did not differ on the remaining EQ-i 2.0 scales is not to say that emotional intelligence is unimportant for success in these areas. Rather, this may be due to the limited variability in EQ-i 2.0 scores for this sample. As a whole, this group of sales representatives scored well above average across all emotional intelligence areas as measured by the EQ-i 2.0, and this is the case for both the top and bottom performance groups. For the results described above, the lower EQ-i 2.0 scores observed for the top or bottom performance group (depending on the scale in question) were not actually "low" scores, but were in the upper end of the mid range, or in the high range, compared to the general population.

Contributing Authors

John Elliott

Senior Course Designer Trainer & Facilitator

John Elliott is a graduate of both York University and the University of Toronto. He holds degrees in Psychology. In addition to his academic credentials, John has extensive skill as a coach and is certified as an EQ Coach and facilitator. His experience in leading organizations and managers through change has been part of his repertoire for over 20 years. He has provided his services to a wide cross-section of clients across a variety of sectors. He has been recognized as an effective presenter who is capable of engaging his audience in interactive and meaningful training. In the past, he has had a robust career in a management and life-skills coaching practice, helping individuals to strive towards their goals.

Currently, he is researching a book on integrating employee development within the context of knowledge management. He is also active in teaching at the post-secondary level and has acted as a mentor for future leaders in organizations. John's insights in helping organizations and individuals meet goals make him a sought after coach and speaker. John translated his expert knowledge of individual and managerial competencies into training that resulted in better and more effective individual performance and team work. For organizations, his insights and training led to both higher performance and increased productivity.

John is a leading practitioner in the field of Emotional Intelligence. John has provided many leaders with an understanding of EQ skill that have helped them accelerate their career prospects. In the past few years John has been supporting leadership and training programs within the OPS. He has designed, developed and delivered numerous courses that specifically support OPS strategic initiatives in the development and retention of talent.

Since 1989, he has spoken to over 1,500 audiences, many of them repeat engagements. His clientele includes Fortune 100 companies, government at all three levels in Canada, and many international corporations. He works in a variety of contexts, including corporate leaders and government officials, representing a remarkably diverse cross-section of the economy. John is much sought after as a speaker, curriculum developer, trainer and executive coach. He has presented keynote speeches, workshops, and seminars all across Canada. His high-quality, high-energy programs are both well-researched and delivered. John's courses are delivered in a down-to-earth style that makes his training a memorable and satisfying experience.

Kelley Marko, MBA, MA

Consultant, Executive Coach and Learning Facilitator

Kelley is president of Marko Consulting Services Inc., a leading Canadian firm working with organizations worldwide in developing high-performance leaders and enabling sustainable and meaningful change. In all his work, Kelley's ultimate focus is to move individuals and organizations to strategy and informed action that impacts the bottom line.

Kelley is also a professional executive coach and certified adult educator. He is a master trainer and coach of emotional intelligence (EQ) and has worked with hundreds of leaders across diverse industries to improve their competencies. Kelley holds an MBA from York University and an MA in Leadership and Learning from Royal Roads University. In addition to leading his own professional practice, Kelley is a seminar leader, and customized in-house program facilitator for the Schulich Executive Education Centre at York University, Toronto, Canada.

His background incorporates front-line through senior leadership positions in industry and professional management consulting with PriceWaterhouseCoopers and in partnership with McKinsey in the area of organization and change strategy. Based in the Toronto, Canada area, Kelley has worked with organizations around the globe including Bell Canada, Toyota, IBM, American Express, Atomic Energy of Canada, Laidlaw Carriers, MOEN, YellowPages Group, and Outward Bound.

Hile Rutledge, MSOD

CEO, OD Consultant, and Author

CEO and Owner of OKA (Otto Kroeger Associates), Hile is author of the *EQ-i Workbook, MBTI® Introduction*, the *Four Temperaments Workbooks* and the co-author of the revised *Type Talk At Work*, *Generations: Bridging the Gap with Type* and *Reversing Forward*. Hile Rutledge is an experienced organization development consultant, trainer and public speaker with a background in management, sales, adult education and leadership development. Hile's primary area of expertise is the use of the Myers-Briggs Type Indicator and the EQ-i assessments as self-management, leadership and communication tools. Hile has done extensive work with both public and private sector clients whose needs range from team building, communications and feedback training, conflict management, strategic planning and other large group events and skills-based workshops.

During his career, Hile has found success in archaeology, public relations, sales management, career counselling and independent organization development consulting. Hile has a BA in Humanities from Hampden-Sydney College and a Master of Science in Organization Development from the American University (AU/NTL). Hile resides with his wife and two sons in Falls Church, Virginia.

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Marcia and her partner, James Terrell, are authors of *The Team Emotional & Social Intelligence Survey® (TESI®)*, an online team assessment. She is co-author of *The Handbook for Developing Emotional Intelligence, A Facilitator's Guide to Team Emotional and Social Intelligence, A Coach's Guide to Emotional Intelligence, The Emotionally Intelligent Team, and Emotional Intelligence in Action* and author of *Life's 2% Solution*. Marcia practiced law for over 20 years, operating her own successful law firm, which focused on complex public policy matters. Before entering private practice, Ms. Hughes worked with governmental and public interest organizations. She served as a special assistant to the Executive Director of the Department of Public Health and the Environment and as an Assistant Attorney General. She clerked on the 10th Circuit Court of Appeals for the Honorable William E. Doyle and served with the Environmental Protection Agency in Washington, D.C. Clients include the World Bank, Medtronic, American Express, Toronto School Board, federal, state and local governments, corporations, non-profits and foundations.

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Dana C. Ackley, Ph.D., is CEO of EQ Leader, Inc., a consulting and executive coaching firm that helps successful leaders prepare for their next level of achievement. He earned his Ph.D. in psychology in 1973. Since that time he has worked with leaders from a variety of organizations, including Fortune 500 companies, the Federal Government, healthcare systems, law enforcement, and local government. He and his colleagues use psychological principles to build leadership skills that become deeply anchored in the individual they coach.

His *EQ Leader Program* (MHS, 2006) is a comprehensive, step-by-step approach to executive EQ skill development. It includes workshops, EQ assessment, development planning, work-based exercises and executive coaching to move participants from conceptual understanding to lasting behavior change. The *EQ Leader Program* is used by coaches and organizations around the world. Training in the program is available through EQ Leader, Inc.

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Manager R&D, Consultant, and Author

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Derek has spent several years investigating the impact of emotion on human performance with elite populations which has been published in several leading professional and academic publications. Most recently he has co-authored the Emotional Intelligence Skills Assessment. Given his expertise in this domain, Derek has also served as a contributing editor to several leading academic and professional journals.

Derek is currently a Manager, Research and Development at Multi-Health Systems Inc., where he has contributed to the growth and accessibility of emotional intelligence through assessment, training and development, and professional presentations throughout North America.

Katie Ziemer, MOrgPsych

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Katie Ziemer is a Senior Research Associate with MHS specializing in the development of corporate assessments and, most recently, the revision of the EQ-i 2.0. With a background in organizational development, performance measurement, training and 360° feedback delivery and design, Katie's focus has always been on blending practices grounded in psychological science into individual and organizational measurement strategies.

Katie has been an external consultant to both private and public organizations across Canada and Australia. She received her BSc (Hons) from St. Mary's University in Halifax and her Master's in Organizational Psychology from Curtin University in Australia. Her education and industry experience is currently being applied to the assessment and sustained development of emotional intelligence.

Brett Richards, MA

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Brett is the founder and President of Connective Intelligence Inc., a global consulting firm that offers business-based solutions to improve the current performance and future potential of organizations. Connective Intelligence specializes in mapping and developing thinking and emotional capabilities to increase individual, team and organizational performance. In addition, Brett is an industry practitioner instructor at the Schulich Executive Education Centre.

With a long time interest and academic training in emotional intelligence, he is also a Master Trainer and Coach with the EQ-i® (emotional quotient inventory) and is the developer of Emotional Power®, a practical business-based model used to apply the concepts of emotional intelligence in the workplace.

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V

Creating the EQ-i 2.0 and EQ 360 2.0

The final section of this handbook covers the construction of the EQ-i 2.0 from its initial stages of development through to establishing its validity.

Chapter 12 focuses on the stages of development for the EQ-i 2.0 and shows how the model, with its fifteen subscales, was finalized. This chapter also includes the rationale behind many of the changes made, including changes to the items, response scale and scale definitions.

Chapter 13 outlines the psychometric properties of both the EQ-i 2.0 and the EQ 360. Statistics supporting the tools' standardization practices, completion of norm groups, reliability and validity are outlined. Please refer to Appendix A for all tables and figures.

CHAPTER 12

EQ-i 2.0 Stages of Development

The EQ-i® 2.0 is a revision of the EQ-i® (Bar-On, 1997, 2004). Both assessments are the products of a rigorous development process, further refining not only the very definition of EI but also the process by which it is measured. The assessment you see today, the EQ-i 2.0, has emerged from 30 years of research, and as the theory of EI has evolved, so too has the instrument and its application to the workplace. This chapter will begin with a short outline of the stages of development for the EQ-i (Bar-On, 1997, 2004) so you may gain an appreciation of the assessment's roots and the rationale behind the changes made in the revision process. The remainder of the chapter will focus on the stages of development for the EQ-i 2.0.

Development of the EQ-i (1997, 2004)

This section details the stages of development[1] for the EQ-i leading up to its release in 1997, and encapsulates changes through 2004. The EQ-i has been evolving since 1988, continuing up until the present revision of the EQ-i 2.0. The EQ-i was originally constructed to examine the determining factors of positive psychological well-being. It was based on the definition of emotional intelligence being a set of non-cognitive competencies and skills that influence one's ability to succeed in coping with environmental demands (Bar-On, 1997).

Identifying the 15 Subscales

In the early 1980s, a comprehensive research strategy was undertaken to examine various factors thought to be components of emotional intelligence (Bar-On, 2004). In the process of researching the many variables that underlie successful emotional functioning, a vast number of constructs were reviewed in the mental health literature. This survey of the literature confirmed Dr. Bar-On's observations from years of clinical experience; that is, similar types of variables were being focused upon, even though they were often labeled and described in different ways. These broader variables could be reduced to a smaller number of key factors that could then be operationally defined in order to gain a clearer picture of the structure and major components of emotional intelligence.

Dr. Bar-On reviewed many theories and studies that focused on the key factors believed to be a part of emotional intelligence and their relationship to optimal, normal, or pathological emotional functioning. This approach was in line with one of the motivating factors for constructing the EQ-i—it represented a departure from earlier assessments that traditionally focused purely on pathological and/or normal (i.e., the lack of pathology) emotional functioning, while neglecting the optimal or successful end of the continuum (Bar-On, 1988).

The grouping of the key components was based on a logical and non-statistical clustering of the theories and studies that were reviewed. It involved analysis, grouping, and, finally, labeling. If factors were similar yet used different words, they were grouped together under one label. For example, independence, autonomy and self-directive would have been grouped under "Independence."

What eventually emerged from this procedure were 11 factors thought to determine successful emotional functioning. These factors were as follows:

- Assertiveness
- Self-Actualization
- Interpersonal Relationships
- Problem Solving
- Flexibility
- Happiness
- Self-Regard
- Independence
- Social Responsibility
- Reality Testing
- Stress Tolerance

Four additional components of emotional intelligence were added during the twelve year period prior to publishing the 1997 version of the EQ-i. Specifically, the Impulse Control subscale was added because it clearly appeared in the literature as contributing to success in coping with environmental demands and pressures (Grinker 1956, 1962, 1969; Grinker & Werble 1974; Offer, 1973; Offer, Freedman, & Offer, 1972; Offer

[1] For more details on the development, or psychometric properties, of the EQ-i (Bar-On, 1997), please refer to the EQ-i Technical Manual (2004).

& Howard, 1972; Offer & Offer, 1975; Offer & Sabshin, 1974). The three other subscales that were added were Emotional Self-Awareness, Empathy, and Optimism. Emotional Self-Awareness was thought to be a distinct component of Self-Regard, so they were separated into two different subscales. Likewise, Empathy was originally thought to be part of the Interpersonal Relationships subscale, but was distinct enough that it deserved to be on its own separate subscale. Lastly, Optimism shared a conceptual connection with Happiness and Stress Tolerance. These three factors, in and of themselves, have been considered to be significant components of emotional intelligence (Goleman, 1995). Therefore, these subscales were added to the EQ-i based on logical, conceptual and, eventually, empirical considerations.

Building the EQ-i

The following is a broad overview of the steps taken to construct the EQ-i:

- A pool of approximately 1,000 items was created from a survey of mental health literature and from working with psychologists and psychiatrists as subject matter experts.
- Items were then narrowed down and selected based on their conceptual and statistical fit to the fifteen EI factor definitions.
- Item 133 ("I responded to every item in this inventory openly and honestly") was added to justify invalidating the profile if the respondent indicated that he or she did not respond honestly.
- Items were placed or sequenced in an order that revealed the least threatening items first to increase rapport with respondents. The remaining items were randomly placed throughout the inventory.
- After considering many response options the following format was chosen:
  - 1 = Very Seldom or Not True of Me
  - 2 = Seldom True of Me
  - 3 = Sometimes True of Me
  - 4 = Often True of Me
  - 5 = Very Often True of Me or True of Me
- Scales detecting "test sabotaging" were added:
  - » Positive and Negative Impression Index
  - » Inconsistency Index
  - » Consideration of omitted items
- Critical items ("I get depressed") were added to detect respondents who may be suffering from emotional disturbance.
- The final form of the EQ-i contained 133 items, comprised of fifteen subscales and three validity scales, with seven to nine items per subscale.
- The norming process was carried out over a number of years in several countries (e.g., South Africa, Germany, Israel, Canada, U.S.). Responses from nearly 4,000 participants were collected and used as normative data, which included a diverse breakdown of age, socioeconomic status, educational attainment, gender, and occupational groups.

Each of these steps involved multiple conceptual and statistical analyses and data collection efforts. For further details on the history and stages of development for the EQ-i, refer to the EQ-i Technical Manual (Bar-On, 1997, 2004).

Development of the EQ-i 2.0

Stages of Development

The EQ-i 2.0 is a revision of the EQ-i (Bar-On, 1997, 2004). In general, the development of the EQ-i 2.0 adopted many of the same aforementioned stages as the EQ-i, but each stage is explained in greater detail for the revised version. There are five broad stages to the development of the EQ-i 2.0:

1. Define the goals of the revision (what needs to change and why).
2. Conceptualize changes to subscales and create new subscales based on the latest EI research and practice using the EQ-i model.
3. Define composite scales and subscales.
4. Build and pilot test the assessment.
5. Conduct norming and subsequent data analyses to refine and confirm the assessment (e.g., factor analysis, examination of validity and reliability).

Stage 1: Define the Goals of the Revision

As demonstrated throughout this manual, the EQ-i has a long and storied history, attesting to its pivotal role in personal coaching, professional enhancement, selection, and leadership development. Despite the varied application and utility of the EQ-i, many lessons have been learned along the way, providing opportunities to refine the conceptual framework from which the EQ-i was derived. As a result, an extensive revision of the EQ-i was undertaken with the overarching goal of enhancing the psychometric properties, usability, and application of the tool, while staying true to the underlying tenets of emotional intelligence first introduced by Reuven Bar-On (1980, 1997).

First and foremost, the goal of this revision was to preserve the foundation and integrity of the EQ-i. The EQ-i has been extensively used in research and practice since 1997, resulting in more than 200 publications, including research articles and dissertations, books and book chapters, and trade

publications, with more than a million applications of the EQ-i, impacting millions of people worldwide. The underlying tenets of the EQ-i are fundamental to its success and warrant retention. Both existing quantitative research and qualitative information collected from over 700 consultants have yielded significant feedback about the strengths and opportunities for improvement within the EQ-i. For example, the strengths have been listed as:

- The 1-5-15 factor structure
- The validity and reliability of the tool
- The emphasis placed on well-being and performance
- The subset of skills and abilities that are amenable to coaching

Conversely, there exist opportunities to improve and strengthen the EQ-i. As a result, the goals presented in Table 12.1 guided all changes made to the assessment.

Each of these goals will be described in more detail throughout this chapter. Keep in mind that many of these goals are intertwined, such that when a change is made to address one area (e.g., address multi-dimensional content scales), it often impacts other goals (e.g., refining the 1-5-15 factor structure). Therefore, although these goals were established at the onset of the revision process, many of them continued to evolve through to the end of the norming stage.

Table 12.1. Guiding Goals of EQ-i Revisions

Goal	Rationale
1. Aligning items and response options.	• There is a disconnect between some of the items on the EQ-i and the available response options. For example, some items (e.g., "I don't do anything bad in my life"), when paired with the existing response options ("Not true of me"), resulted in a double negative, presenting interpretation issues and a higher reading level expected of respondents. • Response options need to be restructured to simplify the administration for the respondents and optimize clarity.
2. Cleaning and clarifying item wording: » Updating language » Eliminating clinical language » Improving item selection to further enhance cross-cultural applicability	• The EQ-i contained clinical or sensitive language within the items making it harder to debrief results in a corporate context. Items such as "I feel comfortable with my body" or "I do very weird things" have less relevance in the workplace and can reduce the face validity of the assessment in that context. • Given the worldwide accessibility of the EQ-i, coupled with an ever-growing diversity of industrialized nations, it is critical that the EQ-i 2.0 remain free from cultural bias and jargon. Items such as "I would stop and help a crying child find his or her parents, even if I had to be somewhere else at the same time," presents a response bias for respondents who come from countries where crying children may be common.
3. Addressing non-unidimensional content scales.	• In the original EQ-i, each of the Emotional Self-Awareness, Impulse Control, and Self-Regard subscales contained multiple constructs. » **Emotional Self-Awareness** addressed emotional expression as well as emotional self-awareness. This scale was divided into Self-Expression and Emotional Self-Awareness. » **Impulse Control** assessed impulsivity and anger. The anger component was removed to better address impulsiveness. » **Self-Regard** addressed both body image and a belief in one's ability. Body image content was removed to more clearly address the notion of Self-Regard as it pertains to inner strength and self-confidence.
4. Reducing interpretation issues associated with scales and their definitions.	• In the original EQ-i, the Problem Solving subscale addressed a linear, pragmatic approach to solving problems. The EQ-i 2.0 places less value on moving step-by-step; instead it addresses how one applies emotional information when solving problems.
5. Items appear on only one scale.	• In the original EQ-i, when items appear on more than one scale, they present interpretation problems and decrease the distinctiveness between subscales.
6. Increasing symmetry between EQ-i and EQ 360.	• In the original, items on the EQ-i and EQ 360 do not match, making a comparison between self-scores (EQ-i) and other raters' scores (EQ 360) difficult.
7. Updating and diversifying norm sample.	• Since the release of the EQ-i in 1997, the population demographics of North America have changed considerably. To remain current and representative, the normative sample (i.e., baseline) must reflect these changes.
8. Refining 1-5-15 factor structure and greater practicality at the composite level.	• User feedback suggested that the current model is difficult to coach to, particularly at the composite level. Intrapersonal and Interpersonal Composites are often confused with one another and do not resonate well with the client.

Stage 2: Conceptualize Changes to Subscales

Item Level Changes

In response to both qualitative and quantitative feedback, each of the original 133 items was examined by a team of test developers to determine its level of quality, clarity, and relevance. In doing so, a number of the items were revised and many new items developed, resulting in a test pool of more than 220 items. Some items in the development version were revised to address social/cultural bias and item content.

- **Social/Cultural Bias.** Given the worldwide accessibility of the EQ-i, the ever-increasing diversity of industrialized nations, and the multicultural composition of the global workforce, it is critical now, more than ever, that the EQ-i 2.0 remains free from cultural bias and jargon. The following example depicts the type of change made to address social/cultural bias.

Original EQ-i Item	Bias	Decision
It's hard for me to see people suffer	In countries and cultures where suffering is more commonplace, this item proves difficult to interpret, especially where a tolerance may be developed for human struggles.	Remove item.

- **Item Content.** The original version of the EQ-i consisted of 133 items, including 7 items that made up the Negative Impression scale. In response to the negative and/or clinical connotations and often ill-perceived implications of the Negative Impression index, the EQ-i: 125, a 125-item version of the standard EQ-i was released minus the Negative Impression items. Although this option was made available to help facilitate administration and improve the EQ-i experience in the corporate context, the exclusion of these items may have sacrificed relevant and often pivotal interpretive information. In response to this dilemma, the EQ-i 2.0 was designed to capture the benefits that a negative impression index offers by creating items for this index that avoided clinical, negative connotations. For example, negative impression items such as "I feel cut off from my body" and "I think I have lost my mind" were removed and replaced with "I have bad days" and "Things bother me."
- To complement the changes to the Negative Impression index, each remaining item was scrutinized and amended if too lengthy, objectionable, or containing suggestive, religious, sexual, or political content. Results of the post-data collection item analyses resulted in moderate modifications to the content of each scale, unifying and clarifying scale content. In direct response to the empirical, theoretical, and practical implications of the item changes, the data collection item pool was eventually reduced to 133 items. In light of these alterations to the items and amendments to the response format as highlighted above, the resulting EQ-i 2.0 is still statistically comparable to the EQ-i (see chapter 13, Standardization, Reliability, and Validity, and Appendix A).

Scale Level Changes

In addition to addressing several concerns at the item level, there remained room to refine the EQ-i at the composite and subscale levels using knowledge that has accumulated over time regarding emotional intelligence in general and the EQ-i specifically. Of primary concern was the frequency of double content scales and subscales with interpretation difficulties.

Multi-Dimensional Content Scales

The goal of any one scale should be to measure a unified construct that captures the essence of a sound theoretically defined target, in this case a distinct component of emotional intelligence. Internal consistency (Cronbach's Alpha, Cronbach, 1951 or K-R 20, Kuder & Richardson, 1937) refers to the extent to which all items on a given scale are related. However, the larger issue for the practical application of an assessment is the homogeneity (i.e., sameness) and unidimensionality (i.e., oneness) that signify the extent to which all items on a scale measure a single underlying factor (Clark & Watson, 1995). Although a scale can consist of a number of related items without being homogeneous, a scale cannot be homogeneous without sufficiently similar items (Clark & Watson, 1995). Because the EQ-i is designed to measure several related facets of emotional intelligence, it is essential that each subscale remain unidimensional and each composite scale intercorrelated. By adhering to this simple principle, the overarching construct of emotional intelligence can be reliably measured by its well defined and unified component parts.

Notwithstanding the rigorous psychometric, theoretical, and applied steps taken during the development of the EQ-i, the Emotional Self-Awareness, Impulse Control, and Self-Regard subscales maintained excellent internal consistency but had distinct sub-components. For example, the Emotional Self-Awareness subscale was comprised of eight items, four of which addressed one's self-awareness while the remainder addressed one's ability to express oneself. In essence, Emotional Self-Awareness captured two highly related but separate skills. Impulse Control contained items that measured impulsivity and anger control, and Self-Regard captured one's level of personal confidence and comfort with one's physical self. Content scales that contain multiple facets present interpretation concerns and, more importantly, provide coaching and development challenges. The EQ-i 2.0 was revised with these limitations in mind and, as a result, each of the 15 subscales presents with one unified construct underpinning the general construct of emotional intelligence.

Interpretation Related Concerns

A distinct benefit of the EQ-i is the applied nature of the conceptual model; it lends itself to coaching, and can be measured through personal & professional growth. Given that applicability, it was a goal of this revision to simplify and clarify interpretation ambiguity associated with Problem Solving and Happiness.

Problem Solving. The Problem Solving subscale placed value and importance on one's ability to remain pragmatic and didactic throughout the problem solving process. For example, a linear, step-by-step process for gathering information and weighing the pros and cons of a given situation, while considering alternative courses of action, was considered ideal. Not all effective problem solvers, however, engage in this style of problem solving. In fact, many top decision makers are required to make rapid decisions and must use emotional information to facilitate their problem solving. As a result, the EQ-i 2.0 was modified to address the process by which one engages emotions during problem solving, instead of focusing on one's respective style for solving problems.

Happiness. Happiness has proven to be fundamentally related to emotional intelligence. Although happiness has long been considered a component of emotional intelligence, research and application suggest that happiness is more likely a by-product of enhanced emotional intelligence. Furthermore, happiness itself is a difficult construct to operationalize and directly coach. Nevertheless, if you consider that factors such as Self-Regard, Interpersonal Relationships, Optimism, and Self-Actualization are intimately linked to happiness, one can better develop a plan for increasing feelings of happiness and contentment by overtly addressing these other behavioral aspects of emotional intelligence. As a result, happiness is viewed both as an indication of one's well-being and a product of emotional intelligence, simplifying the interpretation and applied implications of one's results.

Stage 3: Define Composite Scales and Subscales

The composite and subscale changes that occurred from a re-conceptualization of the EQ-i framework and item level adjustments resulted in the EQ-i 2.0 composite scales and subscales being operationally refined. The test developers aimed to be as comprehensive as possible by incorporating the most significant aspects of contributions made by theorists and researchers over the last several decades. Another important aim was to define scales as clearly, operationally, and distinctly as possible. This step was undertaken to strengthen the foundations of the assessment from the onset so that its validity would measure up to examination by subsequent statistical procedures (e.g., reliability, validity; see Jackson, 1971; Loevinger, 1957).

Professional and theoretical jargon was avoided to create clearly worded and comprehensible definitions that would resonate with the test-taker and the person providing feedback. Definitions that were too abstract, esoteric, and cryptic were rejected. Scales undergoing significant changes to their definitions are shown below:

- Self-Perception (new composite scale)
- Self-Expression (new composite scale)
- Decision Making (new composite scale)
- Emotional Expression (new subscale)
- Problem Solving
- Impulse Control

Stages 1 to 3 laid the theoretical foundations upon which the EQ-i 2.0 was developed. Building on this framework, the next two stages describe how the EQ-i 2.0 was actually constructed and designed to measure the psychological characteristics of EI, while staying true to the underlying tenets of the original EQ-i.

Stage 4: Build and Pilot Test the Assessment

The fourth stage of development consisted of the actual construction of the first (i.e., pilot) version of the EQ-i 2.0. The construction was carried out by selecting items based on the above-mentioned operationally defined factors; deciding upon the exact placement of these items within the inventory, developing a response format, and creating validity scales. This process is similar to that used for the original EQ-i, described in detail by Bar-On (2004). Each step is briefly described below.

For the EQ-i 2.0, the pilot item pool consisted of 221 items. This number was selected to provide adequate coverage of all content areas, while ensuring the length of the inventory was practical for respondents in the pilot testing phase to complete in a reasonable amount of time. A balance was maintained between items phrased in a positive manner and items stated in a negative manner, so that individuals who respond positively or negatively to all items indiscriminately can be easily detected.

Pilot testing (see Standardization section, in chapter 13) was performed to ensure the practical functionality of the assessment (e.g., administration time, instructions, etc.) and to examine the psychometric properties of the items and scales. Statistical analyses were conducted to eliminate items that may have been too confusing, showed little variability in responses, lacked face and construct validity, or were redundant with better performing items.

Item Order

After items were selected for the inventory, they were arranged in a random order. This order was then revised slightly based on practical considerations. Specifically, the least threatening, negative, or emotionally-laden items were presented at the beginning of the inventory. This was done to increase rapport with the respondents and eliminate any potential for intimidation. Within this random order, a rotation process was used to ensure items from the same subscales did not appear in succession.

Response Options and Double Negatives

Throughout the history of the EQ-i the response options have been subjected to examination and have been amended based on feedback from respondents, research findings, as well as practical and applied considerations. The original response format consisted of a 7-point Likert self-rating scale:

1 = Always True of Me
2 = Very Often True of Me
3 = Often True of Me
4 = Sometimes True of Me
5 = Seldom True of Me
6 = Very Seldom True of Me
7 = Never True of Me

The first modification to the response options included reversing the direction of the response format to better align with a more intuitively perceived progression of behavior from less to more. As a result, the response option "Never" was adjusted to align with the smallest response option value (i.e., 1) on the rating scale, while the "Always" response option was moved to align with the highest value on the rating scale (i.e., 7). A second revision to the rating scale resulted in a shortening of the response options from a 7-point scale to a 5-point scale, with moderate modifications made to the extreme poles of the rating scale. The idea of joining "True of Me" with "Very True of Me" and "Not True of Me" with "Very Seldom True of Me" was a way of reducing the burden to the respondent while maintaining a discriminating response set. The changes resulted in:

1 = Very Seldom or Not True of Me
2 = Seldom True of Me
3 = Sometimes True of Me
4 = Often True of Me
5 = Very Often True of Me or True of Me

Despite the positive changes to the response set, there remained a disconnect between some of the items on the EQ-i and the available response options. For example, several items, when paired with the original EQ-i response options, resulted in a double negative, which was problematic for some respondents.

EQ-i Item	Response	Meaning
"I don't do anything bad in my life"	1- "Very Seldom or Not True of Me	The respondent *does not do* this behavior, which in this case means that he would in fact do bad things in his life.

To resolve these issues, the response set was simplified and items were carefully worded or re-worded to avoid double negative situations and make the tool as easy to use as possible. The new response options are:

1 = Never/Rarely
2 = Occasionally
3 = Sometimes
4 = Often
5 = Always/Almost Always

Stage 5: Conduct Norming and Subsequent Data Analyses to Refine and Confirm the Assessment

Various statistical analyses were performed during the course of EQ-i 2.0 construction to ensure that the assessment is of the highest statistical and measurement standards. A majority of these analyses were run following the collection of the normative sample.

The EQ-i 2.0 consists of 133 items, composed of 15 subscales, 1 Well-Being Indicator, and 3 validity scales, with 6 to 9 items per subscale. The 15 subscales are combined into 5 composite scales, with 3 subscales contained in each.

Norming

Since the release of the EQ-i in 1997, the population demographics of North America have changed considerably. To remain current and representative, the normative sample (i.e., baseline) must reflect these changes. In response, the EQ-i 2.0 normative sample consists of 4,000 respondents who are representative of the current North American population by age, gender, race, ethnicity, and educational level. For a more detailed breakdown of the EQ-i 2.0 demographics and normative process please refer to chapter 13, Standardization, Reliability, and Validity.

Data Analyses

Once the normative sample was complete, multiple analyses were conducted to establish the psychometric properties of the EQ-i 2.0 and further refine the assessment to reach its present form. Chapter 13 provides a thorough explanation of the analyses conducted, including:

- Standardization
- Reliability
- Content Validity
- Factor Structure (1-5-15)
- Relationships between EQ-i 2.0 and Other Measures
- Group Differences in EQ-i 2.0 Scores
- Validity Scale Research and Analysis

The final form of the EQ-i 2.0 has 133 items, composed of 15 subscales, 1 Well-Being Indicator, and 3 validity scales, with 6 to 9 items per subscale. The 15 subscales are further grouped into 5 composite scales, with 3 subscales contained in each. The composite scales each contain 23 or 24 items. The subscales were grouped into these composite scales based on their statistical and theoretical relatedness and are combined to create the overall EQ-i 2.0 Total EI Score. The sixteenth subscale, Happiness, is not scored as part of this overall score but is considered a highly relevant and related Well-Being Indicator. The Positive Impression and Negative Impression validity scales contain the same 6 items; these items do not overlap with any of the items in the subscales/composite scales. The Inconsistency Index contains 20 items drawn from items in the subscales/composite scales.

The English language version of the EQ-i 2.0 is simple and straightforward and has been determined to sit between a third and fourth grade reading level at 3.6 (Flesch, 1948; Kincaid, Fishburne, Rogers, & Chissom, 1975). As described in chapter 1, statistical analyses were performed that describe the EQ-i 2.0's standardization and examine its reliability and validity.

CHAPTER 13

Standardization, Reliability, and Validity

This chapter describes the psychometric properties of the EQ-i® 2.0 and EQ 360® 2.0, including standardization, reliability, and validity. The pilot study and standardization studies are described, including a description of the normative data collection, creation of norm groups, and demographic analyses. The reliability sections describe the internal consistency and test-retest reliability of the instruments. The validity sections describe the ability of the EQ-i 2.0 and EQ 360 2.0 to show expected associations with other psychological instruments and expected group differences, which would support the notion that the EQ-i 2.0 and EQ 360 2.0 are valid measures of emotional intelligence. The first section of this chapter is devoted to the standardization, reliability, and validity of the EQ-i 2.0, followed by a section describing these same properties for the EQ 360 2.0. To begin, a brief explanation of effect size, which is instrumental in interpreting these results, will be provided.

All tables and figures representing detailed depictions of these properties are available in Appendix A.

Effect Size

When analyzing data from an extremely large sample (such as the ones described in this chapter), the proper interpretation of what constitutes a significant result is important. There will be several instances throughout this chapter where tests of significance (e.g., *F*-tests) will be reported. As Thompson (2002) noted, significance tests do not inform as to the importance, or practical significance of the test result. Significance tests are greatly influenced by sample size; that is, the larger the sample, the more likely a test will be statistically significant (Thompson, 2002). With a normative sample size of 4,000 in the EQ-i 2.0 and 3,200 for the EQ 360 2.0, it is therefore necessary to examine the practical significance of all analyses, in addition to the statistical significance.

In order to accomplish this, estimates of effect size (e.g., Cohen's *d*) that estimate the strength of the effect are provided for analyses where appropriate. Effect sizes permit the comparison of results across studies, in which sample sizes may differ dramatically. For example, Cohen's *d* illustrates the difference between two means in terms of pooled standard deviations (i.e., a value of 1.00 means that the mean scores from the two groups differ by one pooled standard deviation). Standard criteria, which are not influenced by sample size (Cohen, 1988), are available for determining small, medium, and large effect sizes. For instance, marker values for interpreting small, medium, and large effects with Cohen's *d* are .20, .50, and .80, respectively.

Correlations are also commonly reported in this chapter. Although the interpretation of correlation coefficients varies depending on how you are using them, for the data reported in this chapter, ranges for interpreting small, medium, and large effects with the correlation coefficient (*r*) are .10, .30, and .50 (absolute values), respectively.

Partial eta-squared (η^2) is used to summarize differences between multiple categorical groups or to summarize non-linear differences between groups (e.g., age groups). This statistic is preferable to *d* in analyses where differences between more than two groups are examined (e.g., racial/ethnic groups), or where a non-linear effect is expected, such as the EI age trends, where scores increase up to a point and then decrease over the life span. Partial η^2 is also used to quantify interaction effects between multiple variables (e.g., between age groups and gender). Cutoffs for evaluating partial η^2 as small, medium, and large are .01, .06, and .14, respectively (Cohen, 1988).

EQ-i 2.0 Pilot Study and Standardization

Standardization is an important part of test development, involving the collection of pilot and normative data. Pilot data is used to test the basic functions of an assessment, such as its reading level, response instructions, and completion time. Issues that may arise in these areas can then be addressed before normative data collection begins. Normative data establish a baseline against which all subsequent results are compared, and enable the test developer to capture the characteristics of an "average" respondent. Norms indicate the average performance on a test and the distribution of scores above and below the average (Anastasi, 1988). A large, representative normative database ensures that the reference group is inclusive with respect to demographic variables such as age, gender, education level, and race/ethnicity, increasing the audience to which the assessment is relevant. This section describes the method of data collection and the breakdown of the pilot and normative samples, including the effects of

age and gender on the EQ-i 2.0 results. Data collection for the EQ-i 2.0 followed multiple stages between June 2009 and December 2010. More than 10,000 participants completed the EQ-i 2.0 over this time period. These data were collected for pilot testing, the creation of norms, and validation analyses.

Data Collection

Pilot Phase

This first stage of data collection took place between June 2009 and November 2009. Participants in the EQ-i 2.0 pilot dataset (N = 1,346; Table A.1) were 58.8% female with a mean age of 35.5 years (SD = 14.6 years). The majority of the sample was White (74.9%) and the largest education level group was college/university degree or higher (45.7%). These data were collected to ensure that the basic functionality of the EQ-i 2.0 (e.g., instructions, response options, administration time) was adequate. The pilot study confirmed most aspects of the test protocol and where needed, some adjustments were made to fine tune the assessment.

Normative Phase

This second phase that involved the collection of data that were included in the normative sample, as well as reliability and validity data, took place between March 2010 and December 2010.

Data were gathered from all 50 U.S. states and the District of Columbia, as well as from all 10 Canadian provinces. All participants were sent an email invitation to participate in the EQ-i 2.0 data collection process. Those who agreed to participate completed the assessment online, and were compensated for their time. Various measures were undertaken to ensure all data met the highest levels of data authenticity. For example, data were screened so that any potentially illegitimate assessments (e.g., participant responded with only a single response option for a significant number of items in a row, omitted too many items, took less than 10 minutes or more than 90 minutes to complete the assessment, etc.) were excluded from the dataset. The following section focuses on a description of the normative sample; see the EQ-i 2.0 Reliability and EQ-i 2.0 Validity sections later in this chapter for more information on the reliability and validity samples.

In order to create representative normative samples, specific demographic (i.e., age, gender, race/ethnicity, education level and geographic targets), guided by recent Canadian and U.S. Census information (i.e., Statistics Canada, 2006; U.S. Bureau of the Census, 2008), were utilized during the data collection procedure. In order to create the representative samples for the EQ-i 2.0, information was collected on each participant's gender, age, race/ethnicity (Asian/Pacific Islander, Black/African-American/African-Canadian, Hispanic/Latino, White, Multiracial, or Other), highest level of education attainment (high school or less, some college/university, college/university degree or higher), employment status (employed/self-employed, unemployed, retired, or other), and geographic location (state/province and country). For ease of presentation, race/ethnicity groups are referred to in this manual as follows: Black, Hispanic/Latino, White, and Other.

Standardization

This section describes the process of standardization for the EQ-i 2.0, including a description of the normative sample, and the statistical analyses that were conducted in order to create normative groups and standardized scores.

Normative Sample

Normative data were collected between March 2010 and April 2010. During this time period, 4,996 participants provided EQ-i 2.0 data for standardization purposes. A final sample of 4,000 participants was selected as the normative dataset. Statistical analyses showed no meaningful differences between U.S. and Canadian participants in EQ-i 2.0 scores (i.e., none of the Cohen's d values even reached a small effect size; Table A.2), so data from both countries were included together in a single normative sample. The EQ-i 2.0 normative sample was collected within ten age ranges (400 cases in each age range), equally proportioned by gender (Table A.3). The data provided in Tables A.4 through A.6 indicate that the normative sample is very similar to the Censuses (within 4%) in terms of race/ethnicity, geographic region, and education level. Therefore, the reference group against which individual EQ-i 2.0 scores are compared is representative of the North American general population.

Norming Procedures

The first step in preparation of the norms was to determine if any trends existed in the data. For instance, large differences in scores between men and women, or across various age groups, could provide an argument for creating separate gender- or age-based norm groups. Conversely, a lack of such differences may dictate the use of a single norm group with genders and age groups combined. A series of analyses of covariance (ANCOVA; for Total EI) and multivariate analyses of covariance (MANCOVA; for the Composites and Subscales) were used to examine the relationships between gender and age with EQ-i 2.0 scores. For ease of interpretation, the ten age groups were condensed into five (18–29 years, 30–39 years, 40–49 years, 50–59 years, and 60+ years) for these analyses, with education level and race/ethnicity as covariates (in order to control for the effects of these demographic variables). In an attempt to control for Type I errors that might occur with multiple analyses, a more conservative criterion of $p < .01$ was used for all F-tests.

The Wilk's lambda statistic generated from these analyses ranges from 0.00 to 1.00 and conveys the proportion of variance that is not explained by the effect (in this case, the interaction between gender and age) in the multivariate analyses. These values were all close to 1.00, suggesting that only a small amount of variance could be explained by the interaction. However, *F*-tests revealed significant effects of gender, age, and the interaction of gender and age (see Table A.7). Given these results, the univariate effects are described in detail below.

Focus on Effect Size. The large sample size dictates that effect sizes should be considered more strongly than significance tests (see section on Effect Size earlier in this chapter). The effect sizes are provided in Table A.8. While Cohen's *d* values are reported to describe the size of the gender effects, Cohen's *d* values are not appropriate for describing age effects (where there are more than two groups). Furthermore, previous research has determined that associations between age and EI are generally non-linear, with scores increasing up to a certain age (around age 40–50), then either decreasing slightly or stabilizing (BarOn, 1997). Therefore, examining correlations between age and EI is not suitable; Pearson's correlations are used to estimate linear trends and can therefore underestimate or completely overlook non-linear relationships. Instead, partial eta-squared (partial η^2) values are reported and are used to summarize the overall effect of age on EI (technically speaking, it quantifies the proportion of variance in EI scores accounted for by the age groups).

Gender Effects. Results of the gender analyses showed that males and females did not differ significantly on the EQ-i 2.0 Total EI score, indicating that overall emotional intelligence as measured by the EQ-i 2.0 is the same for males and females; however, small to medium gender effects were found for some subscales (see Table A.8 for effects sizes and Table A.9 for descriptive statistics and significance test results). The largest difference was on Empathy, with women scoring higher than men with a moderate effect size (*d* = -0.49). Smaller differences were found with women scoring higher than men on the Interpersonal Composite (*d* = -0.33), Emotional Expression (*d* =-0.31), and Emotional Self-Awareness (*d* = -0.22). Men scored higher than women with small effect sizes on Stress Tolerance (*d* = 0.30), Problem Solving (*d* = 0.26), and Independence (*d* = 0.21). These differences are compatible with the logic of the EQ-i 2.0 conceptual framework and show empirical precedence, such as in the original EQ-i (see Bar-On, 2004). However, it is important to note that these effects were small and represent only a few absolute standard score points.

Age Effects. Significant but small age effects were found for the EQ-i 2.0 (see Table A.8 for effect sizes and Table A.10 for descriptive statistics and significance test results). The age differences varied from scale to scale. In some instances, scale scores increased with age (i.e., Total EI, Self-Regard, Interpersonal Composite, Interpersonal Relationships, Empathy, Stress Management Composite). In other cases, scores increased until about age 40–49 years, then the scores stabilized or decreased slightly (i.e., Self-Expression Composite, Independence, Problem Solving, Flexibility, Stress Tolerance). Differences between age groups were generally only a few standard score points in magnitude. Previous research has demonstrated similar age trends (see Bar-On, 2004). Emotional Self-Awareness and Assertiveness were the only subscales that failed to show at least a small effect size.

Gender × Age Interaction. There were no interactions between age and gender; partial η^2 values did not reach the minimum criterion for a small effect size (Table A.8). In fact, partial η^2 values were .00 for all scales. In other words, any age effects were consistent within males and females, and any gender effects were consistent within age groups.

Overall, the age and gender analyses revealed significant, but small effects. Therefore, both specific "Age and Gender norms" (i.e., age and gender specific) as well as "General population norms" (i.e., neither age nor gender specific) were developed. Actual construction of the norms was conducted through a multi-step statistical process. Results revealed that skewness and kurtosis values were close to 0 (skewness values ranged from -0.93 to -0.15; kurtosis values ranged from -0.17 to 0.77), and an examination of the scale histograms did not reveal any significant departures from normality (an example histogram for the EQ-i 2.0 Total EI score is provided in Figure A.1). Therefore, artificial transformation of scores to fit normal distributions was deemed unnecessary.

In the next step, means were statistically smoothed for the Age and Gender norms. Data points that diverged significantly from a smooth curve partly reflect true differences and partly reflect sampling variability (Zachary & Gorsuch, 1985). To mitigate the effect of sampling variability, the data were smoothed using the following technique. Means and standard deviations were computed at each age group, separately for males and females, for every score. For each scale, regression analysis was used to find the best fitting curve (linear or curvilinear) across age. Linear and quadratic effects of age were the independent variables, and the mean scores at each age were the dependent variables. At each age, the score mean predicted from the regression was used in conjunction with the original (unsmoothed) mean to produce the final norms. Specifically, the final "smoothed" mean was a weighted mean of the regression generated value, and the original, unsmoothed mean (each a 50% weighting). Use of this smoothed normative value allows for irregular but real differences between age groups to have an effect, while reducing the impact of random fluctuation. The smoothed values were averaged within each of the five age groups for the computation of the standard scores. For example, the

mean of the means and standard deviations for 18-year-olds, 19-year-olds, 20-year-olds, and so on up to 29-year-olds were computed for the 18-29 years group.

Standardization Summary

Over 10,000 EQ-i 2.0 assessments were collected between 2009 and 2010 for the standardization of the tool. A sample of 4,000 participants was chosen as the EQ-i 2.0 normative sample. The sample was evenly distributed by gender and age, and matched to the Census based on race/ethnicity, geographic region, and highest level of educational attainment. Statistical analyses revealed small differences across gender and age; therefore, general norms as well as separate age and gender norms are available as options in the use of the EQ-i 2.0. The norming process resulted in standard scores with means of 100 and standard deviations of 15 for the Total EI score, Composite Scales, and Subscales.

EQ-i 2.0 Reliability

Reliability is defined as "the consistency of scores obtained by the same person when re-examined with the same test on different occasions, or with different sets of equivalent items, or under other variable examining conditions" (Anastasi, 1988, p. 102). Two basic statistical methods for evaluating a test's reliability are internal consistency and test-retest reliability analyses. Internal consistency refers to the general cohesiveness of its items, or the degree to which a particular set of items assess a single construct. Test-retest reliability refers to the stability of scores over time. Each of these two analyses was conducted for the EQ-i 2.0. From a practical perspective, internal consistency may be used to calculate the precision or "margin of error" associated with an individual's EQ-i 2.0 score. These values are also referred to as *confidence intervals (CI)*. Reliability analyses are also used to determine which subscales are in balance or out of balance with one another within a client's EQ-i 2.0 profile (i.e., what is a meaningful difference between an individual's subscale scores?).

Internal Consistency

Internal consistency conveys the degree to which a set of items are associated with one another. High levels of internal consistency suggest that the set of items are measuring a single, cohesive construct. Internal consistency is typically measured using Cronbach's alpha (Cronbach, 1951). Cronbach's alpha ranges from 0.0 to 1.0 and is a function of (a) the interrelatedness of the items in a test or scale and (b) the length of the test (John & Benet-Martinez, 2000). Higher values reflect higher internal consistency.

Cronbach's alpha values for the EQ-i 2.0 scales in the normative sample are presented in Table A.11 (see Standardization earlier in this chapter for a description of the normative sample). Given that Cronbach's alpha is influenced by the number of items in a set (with more items generally leading to higher alphas), the number of items per scale is also displayed in this table. Though there is no universal criterion for a "good" alpha level, informal cutoffs for evaluating alpha are typically .90 is "excellent," .80 is "good," .70 is "acceptable," and less than .70 is "unacceptable." Most of the values found in Table A.11 demonstrate excellent reliability for the EQ-i 2.0, particularly notable given the small number of items included in most subscales. Looking at the General (Total Sample) column, the alpha value of the Total EI scale was .97, values for the composite scales ranged from .88 to .93, and values were .77 or higher for all subscales. These values were similar within the various age and gender normative groups, including a Total EI alpha of at least .97 in each norm group. Furthermore, these values are generally higher than those found in the original EQ-i normative samples. For instance, the average alpha reliability value for the original EQ-i Total EI score across nine normative samples was .79 (Bar-On, 2004). The high level of internal consistency found in the EQ-i 2.0 Total EI score supports the idea that, taken together, the EQ-i 2.0 items are measuring a single cohesive construct—namely, emotional intelligence.

Confidence Intervals

A practical application of alpha values is that they may be used to calculate the precision or margin of error associated with individual scores. Specifically, alpha values may be used to calculate confidence intervals for each individual score. Unlike physical attributes, such as height and blood pressure, psychological characteristics (such as EI) cannot be measured directly. Psychological assessments serve as estimates of an individual's true score on these dimensions, and therefore some degree of uncertainty is associated with the obtained scores. Confidence intervals are a method of measuring the degree of this uncertainty. The relationship between alpha values and confidence intervals is inverse; as alpha values increase, confidence intervals decrease. In other words, as the internal consistency of an assessment increases, the degree of uncertainty decreases.

Confidence intervals at the 90% confidence level for all EQ-i 2.0 scores are integrated into the computerized reports as an option the user may select. For example, if a client obtains a score of 105 on the EQ-i 2.0 Total EI scale, 90% confidence intervals suggest that the margin of error is ± 4 points, with the true score ranging from a low of 101 to a high of 109. In other words, this individual's actual level of EI will fall within this interval 90% of the time. Note that the score of 105 still remains the best single point estimate of the client's Total EI.

Balancing EI: Comparing Differences in Subscale Scores

The EQ-i 2.0 report includes an optional Balancing Your EI section. This section compares scores from every subscale to three related subscales. For example, Self-Regard is compared to Self-Actualization, Problem Solving, and Reality Testing (see chapter 8 for details on interpreting the Balancing Your EI section). Analyses similar to those used to generate confidence intervals were used to calculate the size of "gaps" between EQ-i 2.0 subscales. Results from these analyses were used to guide the critical value at which point scales were determined to be "in balance" or "out of balance" with each other. Specifically, considering the results of these analyses as well as practical functionality, a critical value of 10 points was selected for the Balancing Your EI section. This value is actually slightly smaller than those suggested by the statistical analyses, but was selected so the user can be confident that they are identifying any potentially important imbalances in EI abilities. For example, if two subscales in the Balancing Your EI section are less than 10 points apart, they will be reported as being "in balance," whereas subscale scores that are 10 or more points apart will be described as being "out of balance."

Test-Retest Reliability and Stability

The test-retest reliability of an assessment refers to the consistency of scores over time. This type of reliability is typically calculated by examining the correlation between an individual's scores on the same assessment at two different times. This time interval must not be too long (Anastasi, 1982) to ensure that factors such as developmental changes do not overly obscure the assessment of the instrument's reliability, and must not be too short as to be contaminated by memory effects (Downie & Heath, 1970). A two- to eight-week interval between administrations is usually recommended.

When test-retest reliability is assessed at the group level, high correlations indicate that the rank-order of individuals' assessment scores have remained consistent over time. However, differences in mean scores may confound these results. For example, if each individual's score increases or decreases in a dramatic but uniform manner over time, the test-retest correlation for the overall sample will remain high. Test-retest stability analyses can be used to determine not only if the rank-order of scores remains consistent, but if the actual scores themselves remain stable over time. Test-retest stability was examined by calculating the difference between Time 1 and Time 2 standard scores for each individual in the test-retest samples.

For the EQ-i 2.0, test-retest data was available for 204 individuals who were assessed two to four weeks apart (mean interval = 18.41 days, *SD* = 3.22 days), and for 104 individuals who were assessed approximately eight weeks apart (mean interval = 56.80 days, *SD* = 1.25 days). Demographic characteristics of the two retest samples are displayed in Table A.12. EQ-i 2.0 test-retest correlations are expected to be high for the two- to four-week interval, supporting the reliability of the EQ-i 2.0 as a tool, because a person's EI should not change much over two to four weeks, especially in the absence of any EI-targeted intervention, as was the case in our data (see Stein & Book, 2000). However, in general, test-retest correlations also tend to decrease as the time interval between assessments increases because there is more opportunity for developmental changes or other events to occur. Therefore, the 8-week test-retest values are expected to be slightly lower than the 2- to 4-week values. Nonetheless, test-retest correlations (see Table A.13) were high for the EQ-i 2.0 Total EI score in both the 2- to 4-week (r = .92) and 8-week samples (r = .81). Test-retest correlations for the various Composite scales were very high, ranging from r = .86 (Self-Expression Composite) to r = .91 (Interpersonal Composite) in the 2- to 4-week sample, and from r = .76 (Interpersonal Composite) to r = .83 (Decision Making Composite) in the 8-week sample. Finally, results for the subscales were also high, ranging from r = .78 (Impulse Control) to r = .89 (Empathy) in the 2-4-week sample and from r = .70 (Flexibility) to r = .84 (Self-Regard, Happiness) in the 8-week sample. These values were generally similar to those found in the original EQ-i (Bar-On, 2004).

The stability of the EQ-i 2.0 scores was examined by calculating the difference between Time 1 and Time 2 standard scores for each individual in the test-retest samples. Tables A.14 (2- to 4-weeks) and A.15 (8 weeks) display the frequencies of these differences, as well as the mean differences (i.e., the difference between Time 1 and Time 2 ratings for each individual averaged across the samples) and the 95% confidence interval surrounding the mean difference. Positive mean differences indicate that scores increased over time, whereas negative mean differences indicate that scores decreased over time. The results suggest scores remained highly stable over time: for almost all scales, roughly 90% or more of the individuals' scores did not change by more than one normative standard deviation (i.e., 15 standard score points) over time in both the 2- to-4-week and 8-week samples. Confidence intervals around the mean differences were also consistently small, and instances where this interval encapsulates zero suggest that the difference is not statistically significant (p < .05). These results provide support that the EQ-i 2.0 captures the temporal stability of emotional intelligence.

Reliability Summary

Overall, the EQ-i 2.0 demonstrates sound reliability. Internal consistency (alpha) values were generally high for the overall normative groups and within specific age and gender subgroups, suggesting that the items cohesively measure Total EI, as well as the constructs represented by

the composite scales and subscales. Test-retest reliability and stability values were also high at both 2- to 4-week and 8-week intervals, reflecting a level of temporal stability that would be expected for emotional intelligence. Users of the EQ-i 2.0 can be confident that the scores generated by this assessment will be consistent and reliable.

EQ-i 2.0 Validity

Reliability is necessary for, but does not ensure, validity. The validity of a test refers to whether the test measures what it claims to be measuring; in this case, does the EQ-i 2.0 measure emotional intelligence? The quality of inferences that can be made by the test's scores, and the validity of an instrument like the EQ-i 2.0, rests upon the weight of accumulated evidence from a number of validity studies using various methodologies (Campbell & Fiske, 1959). Various types of validity were examined for the EQ-i 2.0. Specifically, how well does the EQ-i 2.0 measure the construct(s) it was designed to measure, how well are the claims regarding its use and applications supported by empirical evidence, and is the EQ-i 2.0 free of test-bias?

Evidence that the EQ-i 2.0 measures the constructs it was designed to measure include:

- a description of the content validity of the assessment;
- the appropriateness of the scale structure (including the Positive and Negative Impression scales and Inconsistency Index); and
- an exploration of the relationship of the EQ-i 2.0 scores to those from other instruments.

In terms of the use and applications of the EQ-i 2.0, evidence is provided that the EQ-i 2.0 scores are related to external criteria, including expected differences between the following groups of individuals:

- Leaders and non-leaders
- Individuals with higher, compared to lower, levels of education
- Control group to clinical groups (i.e., individuals diagnosed with clinical depression or other psychological conditions)

Following these analyses, results from an examination of potential bias across racial/ethnic groups will be presented. As a general psychological characteristic, EI is expected to be similar across racial/ethnic groups; group differences would indicate that the EQ-i 2.0 may be biased towards certain racial/ethnic groups.

Finally, the Validity scales were validated:

- The validity of the Positive Impression and Negative Impression scales was examined by comparing scale scores between individuals instructed to present either overly positive or negative impressions to individuals who completed the scales under standard instructions.
- The validity of the Inconsistency Index was examined by comparing scores between the EQ-i 2.0 normative sample and a dataset of randomly generated EQ-i 2.0 item responses.

Content Validity

Content validity is achieved when an assessment shows adequate coverage of the content it is proposed to measure, based on the conceptual framework of the construct. Support for this type of validity is often provided through non-statistical methods (Jackson, 1971). For the EQ-i 2.0, content validity of the items was analyzed by mapping their relevance to the EI construct by content experts. The conceptual framework of the EQ-i 2.0 is highly similar to that of its predecessor, the EQ-i (see Bar-On, 2004). Content validity of the original EQ-i was established through the systematic method of item generation (see chapter 12). Specifically, the essence of each of the factors relevant to EI was articulated through detailed definitions. Items were then developed to encompass these definitions. Content experts scrutinized these items for their relevance to EI and the factors with which they were associated. Any items deemed irrelevant to a particular factor were moved to a more relevant factor, or discarded if their relevance could not be established. Based on these procedures, the final form of the EQ-i 2.0 adequately satisfied the requirements of content and face validity (Anastasi, 1988).

Factor Structure

The conceptual framework of the EQ-i 2.0 can be considered hierarchical. As displayed in Figure 3.5 in chapter 3, several correlated factors comprise EI. The 15 subscales are categorized into the five composite scales, which combine to form the overall EI factor (i.e., Total EI). Evidence for the existence and appropriateness of the proposed EQ-i 2.0 factor structure was examined in several ways:

- Exploratory factor analyses (EFA) were used to determine whether the theoretically-based subscales empirically emerge from the normative data set.
- Confirmatory factor analyses (CFA) were used to determine whether the factor structure identified through theory and EFA results may be replicated in an independent data set.

- Correlations among composite scales and subscales were used to establish the degree of multidimensionality in the EQ-i 2.0. These correlations should be moderate in size; they should be high enough to indicate that the scales are all assessing a common underlying trait—emotional intelligence—yet they should not be so high as to indicate redundancy in the scales.

For the EFA and CFA analyses, the normative sample was split equally into two demographically-matched subsamples (Table A.16) to provide independent replication of the factor structure. Correlations among the scales were computed on the entire normative sample.

Exploratory Factor Analyses

The factor structure of the EQ-i 2.0 items was determined through a series of exploratory factor analyses (EFAs). This analysis is exploratory, as the EQ-i 2.0 contains many new or revised items from the original EQ-i. Five EFAs were conducted on the exploratory subsample of the normative sample, analyzing the items within each composite scale separately. In each EFA, a three-factor solution was determined to be the most appropriate based on statistical (eigenvalues/scree plot) and non-statistical (interpretability) criteria. Principal axis factoring extraction was used because the goal of the analysis was to identify the underlying constructs expected to produce the EQ-i 2.0 scores. Direct oblimin (i.e., oblique) rotation was used because the factors were expected to correlate with each other, given that they all share a common underlying construct (i.e., the composite scale factor). Reverse-scoring was applied to relevant items prior to the analysis. Factor loadings were considered significant if they reached at least ± .300, and an item was defined as cross-loading if it was significant on more than one factor and had loadings within .100 of each other on these factors.

For the **Self-Perception Composite** EFA, the first factor contained eight items covering areas such as self-confidence, self-respect, and a generally positive self-image, matching the definition of the Self-Regard subscale. The second factor contained seven items covering awareness and understanding of one's own emotions, matching the definition of the Emotional Self-Awareness subscale. The third factor contained nine items covering personal striving, ambition, and achievement, and matched the definition of the Self-Actualization subscale. Each item loaded significantly onto one factor and there were no cross-loadings.

For the **Self-Expression Composite** EFA, the first factor contained eight items covering areas such as autonomy and self-sufficiency, corresponding with the definition of the Independence subscale. The second factor contained eight items relating to one's ability to describe, express, and share their emotions, matching the definition of the Emotional Expression subscale. The third subscale contained seven items referring to one's tendencies towards being direct and "speaking one's mind," matching the definition of the Assertiveness subscale. Again, each item loaded significantly onto one factor and there were no cross-loadings.

In the **Interpersonal Composite** EFA, the first factor contained eight items covering areas such as sociability and friendliness, corresponding to the definition of the Interpersonal Relationships subscale. The second factor contained nine items referring to one's awareness, receptiveness, and respectfulness towards the emotions of others, corresponding with the definition of the Empathy subscale. The third factor covered consciousness of social/global issues and one's contributions towards addressing these issues, matching the definition of the Social Responsibility subscale. Each item loaded onto one factor with no cross-loadings.

The first factor emerging from the **Decision Making Composite** EFA included eight items referring to one's emotional process when faced with problems, matching the definition of the Problem Solving subscale. The second factor contained eight items describing one's general awareness and tendency to be objective and impartial, corresponding to the definition of the Reality Testing subscale. The third factor contained eight items covering one's ability to combat impulses and temptations, matching the definition of the Impulse Control subscale. Each item loaded significantly onto one factor except for one item (I interrupt when others are speaking). This item was retained on the Impulse Control factor due to its theoretical relevance and the fact that it loaded more highly on the Impulse Control factor (.248) than on the other two factors (.034 and .004). No items cross-loaded across multiple factors.

Finally, the first factor generated from the **Stress Management Composite** EFA included eight items describing one's positive outlook towards other people and the future in general, matching the definition of the Optimism subscale. The second factor contained eight items describing one's ability to manage change and unpredictability, corresponding to the definition of the Flexibility subscale. The third factor contained eight items referring to one's ability to endure and cope with high-pressure situations and matched the definition of the Stress Tolerance subscale. Each item loaded onto a single factor with no cross-loadings.

To summarize, the EFAs generated an easily interpretable set of fifteen factors from the EQ-i 2.0 items. In addition, the items empirically grouped into the factors outlined by the theoretical framework of the instrument.

Confirmatory Factor Analyses

Confirmatory factor analyses (CFAs) were conducted on the confirmatory subsample of the EQ-i 2.0 normative data. Six models were tested. The first, called the Overall Model, consisted of the five composite scales loading onto Total EI.

The other five CFAs were conducted at the composite scale level, each with the three relevant subscales loading onto their respective composite scale. Results from these analyses provide further support for the theoretical factor structure of the EQ-i 2.0, as well as the empirical results generated by the EFAs. Goodness of fit indices are displayed in Table A.17. Specifically, the Goodness of Fit Index (GFI; Jöreskog & Sörbom, 1986), Adjusted Goodness of Fit Index (AGFI; Jöreskog & Sörbom, 1986), Normed Fit Index (NFI; Bentler & Bonett, 1980), Non-Normed Fit Index (NNFI; Bentler & Bonett, 1980), Comparative Fit Index (CFI; Bentler, 1990), and Root Mean Square Error of Approximation (RMSEA; Steiger & Lind, 1980) were examined to evaluate the fit of the models. General guidelines for adequate model fit are values below .10 for the RMSEA and above .90 for the remaining fit indices. Values suggested adequate fit for the models, providing further support for the factor structure of the EQ-i 2.0 as outlined by theory and EFA results.

Correlations Among EQ-i 2.0 Composite Scales and Subscales

After establishing the existence of the proposed subscales through EFA and obtaining further verification through CFA, correlations among the EQ-i 2.0 composite scales and subscales were examined to determine the degree of cohesiveness among them. It is expected that these correlations will be generally high, given that they are all measuring the same underlying construct—emotional intelligence—but they should not be so high as to indicate redundancy between the subscales. Tables A.18 (Composite Scales) and A.19 (Subscales) display these correlations observed in the EQ-i 2.0 normative sample. These correlations matched closely to hypotheses. Each composite scale correlation reached at least a large effect size, ranging from r = .50 (Interpersonal/Decision Making) to r = .78 (Self-Perception/Stress Management). Subscale correlations were also of the expected magnitude. As highlighted in Table A.19, virtually all subscale correlations within a composite reached at least a medium effect size and over half reached at least a large effect size, ranging from r = .27 (Reality Testing/Impulse Control) to r = .70 (Self-Regard/Self-Actualization). These results support the notion that a single, underlying dimension is being represented in the EQ-i 2.0, yet there is clear evidence for the multidimensional nature of the assessment.

Relationship of the EQ-i 2.0 to Other Measures

The validity of the EQ-i 2.0 was further evaluated by examining its overlap with other psychological measures. These analyses inform whether the EQ-i 2.0 assesses the construct it is intended to assess—namely, emotional intelligence. Specifically, correlations between the EQ-i 2.0 and these other measures are examined. The expected pattern of correlations (magnitude, direction) depends on the relevance and degree of overlap among the psychological constructs these measures are proposed to assess. Validity is supported by the extent to which the actual correlations correspond with these theoretical associations. For example, is the EQ-i 2.0 related to other measures of emotional intelligence but unrelated to measures of different content, like critical thinking? For the EQ-i 2.0, these external psychological measures included:

- the original version of the EQ-i (Bar-On, 2004);
- the Social Skills Inventory (SSI; Riggio & Carney, 2003), a measure of emotional and social communication skills;
- the NEO Five Factor Inventory (NEO-FFI; Costa & McCrae, 1992), a measure of fundamental personality traits;
- the Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT; Mayer, Salovey, & Caruso, 2002), an ability-based measure of EI, and
- the Watson-Glaser II Critical Thinking Appraisal (Watson & Glaser, 2009), a measure of critical thinking.

Demographic characteristics of the samples used in these analyses are displayed in Table A.20.

Relationship Between EQ-i 2.0 and the Original EQ-i

The original EQ-i (Bar-On, 2004) is a 133-item self-report measure designed to assess emotional intelligence (EI). Bar-On defines EI as "an array of non-cognitive capabilities, competencies, and skills that influence one's ability to succeed in coping with environmental demands and pressures" (p. 14). Other key features of the EQ-i's conceptual framework are that it is multifactorial and relates to potential for performance rather than performance itself (i.e., the potential to succeed rather than success itself). It is process-oriented rather than outcome-oriented, unlike ability-based conceptualizations of EI such as that measured by the Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT; Mayer et al., 2002). The 15 EI constructs assessed by the EQ-i are measured by the EQ-i subscales, organized as outlined in Figure 3.1 in chapter 3. This figure also illustrates the slight changes made to the organization of the subscales in the EQ-i 2.0 revision. Because the models are very similar, it is expected that correlations between the EQ-i and EQ-i 2.0 will be large.

Correlations between the EQ-i 2.0 and the original EQ-i are displayed in Table A.21. Correlations between overlapping subscales are presented in this table (i.e., the correlation between the two Interpersonal Relationships subscales, the correlation between the two Flexibility subscales, and so on). Despite the updates made to the EQ-i 2.0 from the original EQ-i, correlations between the subscales on the two measures were high. Correlations between the Total EI score of each measure was r = .90, suggesting a high degree of overlap

between the two versions at the overall EI level. The majority of the subscale correlations between the EQ-i and EQ-i 2.0 were high. This trend was particularly evident for subscales that underwent very minor changes between the two versions of the scale, with correlations ranging from $r = .65$ to $r = .88$ (see shaded cells in Table A.21). Conversely, for subscales that underwent more dramatic changes between versions (see chapter 3; unshaded cells in Table A.21), correlations were still high but lower, as expected, than those found for the unchanged subscales. These correlations ranged from $r = .49$ to $r = .57$. One exception was the correlation between Emotional Expression and the original EQ-i Emotional Self-Awareness subscale ($r = .84$). Many of the Emotional Self-Awareness items from the original EQ-i were incorporated into the new Emotional Expression subscale, which explains this high correlation. Overall, correlations between the EQ-i 2.0 and the original EQ-i reflect not only the stability of the construct measured by the two assessments, but also the changes in item content made in the recent update to the EQ-i 2.0.

Relationship between EQ-i 2.0 and SSI

The Social Skills Inventory (SSI; Riggio & Carney, 2003) is a 90-item self-report measure designed to assess "basic social communication skills" (Riggio & Carney, p. 5). The scale captures the expression, sensitivity, and control (i.e., regulation) aspects of communication in two domains: emotional (nonverbal) and social (verbal). This conceptualization results in six subscales: Emotional Expression, Emotional Sensitivity, Emotional Control, Social Expression, Social Sensitivity, and Social Control. Along with a Total SSI Score, these subscales are collapsed into Total Emotional and Social Scales as well as Total Expression, Control, and Sensitivity Scales. It is expected that the EQ-i 2.0 will correlate more strongly with the Emotional Scales than the Social Scales. For instance, although the SSI authors admit that the tool does not fully capture all aspects of EI, they specifically state that the SSI Emotional subscales "can be used as indicators of emotional intelligence" and "could be used as an alternative to existing self-report measures of emotional intelligence" (Riggio & Carney, p. 6). These statements summarize the relevance of the SSI to the EQ-i 2.0.

Emotional intelligence is proposed to be relevant to social skills as measured by the SSI, especially the SSI Emotional Subscales. Therefore, most correlations between the EQ-i 2.0 and the SSI should be strong and positive. As illustrated in Table A.22, the EQ-i 2.0 Total EI score correlated positively with the SSI Total Score ($r = .54$; $p < .01$). With the exception of Impulse Control ($r = -.13$; $p = .19$), each of the EQ-i 2.0 composite scales and subscales correlated significantly with the SSI Total Score. The EQ-i 2.0 Total EI score also showed significant positive correlations with most of the SSI Subscales. Exceptions were a non-significant correlation with the Total Sensitivity Scale ($r = .08$; $p = .43$) and a significant negative correlation with the Social Sensitivity Scale ($r = -.35$; $p < .01$). Riggio and Carney describe the Social Sensitivity Scale as measuring "an individual's sensitivity to and understanding of the norms governing appropriate social behavior" (p. 5), and also suggest that extremely high scores may indicate self-consciousness and general insecurity, which could explain the negative correlation with the EQ-i 2.0. The nonsignificant correlation between the EQ-i 2.0 and the Total Sensitivity Scale is likely due to the former's positive correlation with the Emotional Sensitivity Scale and negative correlation with the Social Sensitivity Scale cancelling each other out. These results provide support for the idea that higher EI is related to stronger social skills.

Relationship between the EQ-i 2.0 and the NEO-FFI

The NEO Five-Factor Inventory (NEO-FFI; Costa & McCrae, 1992) is a shortened, 60-item version of the NEO Personality Inventory-Revised (NEO-PI-R; Costa & McCrae, 1992). This scale measures what are considered to be the five fundamental personality traits according to the Five-Factor Model of personality: Neuroticism, Conscientiousness, Openness to Experience, Agreeableness, and Extraversion. Conceptually, the Big Five and emotional intelligence share certain features, such as positive correlations with occupational performance (e.g., Mount & Barrick, 1998). In a recent meta-analysis, Van Rooy and Viswesvaran (2004) found significant positive correlations between EI and each of the Big Five factors, ranging from $r = .23$ (Agreeableness, Openness to Experience) to $r = .34$ (Extraversion). Therefore, it is expected that the EQ-i 2.0 will correlate positively with the NEO-FFI subscales (except for Neuroticism, where negative correlations are expected).

The EQ-i 2.0 Total EI score correlated significantly with the NEO-FFI Neuroticism (note that the negative correlations are in the expected direction), Extraversion, Agreeableness, and Conscientiousness subscales, but not with Openness to Experience (Table A.23). The pattern of correlations suggests that EI is distinct from personality. The correlations also support the hypotheses that high levels of Neuroticism may inhibit EI development, whereas high levels of Extraversion and Conscientiousness may help facilitate EI skills.

Relationship between EQ-i 2.0 and MSCEIT

The Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT; Mayer et al., 2002) is a 141-item ability-based measure of EI. The MSCEIT is ability-based in that it considers EI as a skill and measures it through items that require the respondent to demonstrate their level of EI by performing various relevant tasks and solving emotional problems. The scale is a "test" in the true sense of the word in that items

are considered to have correct and incorrect responses, based on either general consensus or expert consensus. This feature defines the MSCEIT as outcome-oriented as opposed to process-oriented as in the EQ-i 2.0 (see Bar-On, 2004). The distinction between ability-based measures like the MSCEIT and trait-based measures like the EQ-i 2.0 has long been established by researchers (Austin, 2010; Brackett & Mayer, 2003; Mayer et al., 2002; O'Boyle et al., 2011; Van Rooy & Viswesvaran, 2004). In line with this research it is expected that the EQ-i 2.0 and the MSCEIT would not be strongly correlated.

In the MSCEIT, the Total Emotional Intelligence Quotient (EIQ) score comprises eight subscales called Tasks: Faces, Pictures, Sensations, Facilitation, Changes, Blends, Emotion Management, and Emotional Relations. These Tasks are categorized into four Branch scores: Perceiving Emotions (Faces, Pictures), Facilitating Thought (Sensation, Facilitation), Understanding Emotions (Changes, Blends), and Managing Emotions (Emotion Management, Emotional Relations). The Branch scores are further categorized into two Area scores: Experiential (Perceiving Emotions, Facilitating Thought) and Strategic (Understanding Emotions, Managing Emotions). Task, Branch, and Area scores provide different levels of scope of the individual's EI abilities. Further description of these scales is provided by Mayer et al. (2002).

The EQ-i 2.0 conceptualizes EI as a trait-based measure, whereas the MSCEIT assesses EI as an ability-based measure. For these reasons, it is expected that the relationship between MSCEIT and EQ-i 2.0 scores will be moderate, at best. In our sample, these correlations are displayed in Tables A.24 and A.25. Indeed, the correlation between the EQ-i 2.0 Total EI score and the MSCEIT Total EI Score was $r = .12$ ($p = .22$). The vast majority of MSCEIT Task Scores, Branch Scores, and Area Scores were not significantly correlated with EQ-i 2.0 composite or subscale scores. This pattern of results demonstrates that the EQ-i 2.0 measures trait-based EI that does not overlap with EI as measured by the MSCEIT. On a larger, conceptual level, these results support the idea that trait-based EI and ability-based EI are independent constructs.

Relationship between EQ-i 2.0 and Watson-Glaser II

The Watson-Glaser II Critical Thinking Appraisal (Watson & Glaser, 2009) is "designed to measure important abilities and skills involved in critical thinking" (p. 1). Along with a Total Score, the three subscales of the Watson-Glaser II are Recognize Assumptions, Evaluate Arguments, and Draw Conclusions. Individuals must evaluate a series of exercises that cover these areas, such as rating the degree of truth or falsity of various inferences. Validity of the scale is demonstrated through correlations with similar ability measures such as the Wechsler Adult Intelligence Scales-IV (WAIS-IV; Wechsler, 2008) and occupational and academic success. However, emotional intelligence is considered to be independent of more traditional cognitive abilities such as critical thinking. Therefore, it is presumed that the EQ-i 2.0 will be largely uncorrelated with the Watson-Glaser II.

The correlations between the Watson-Glaser II and the EQ-i 2.0 are displayed in Table A.26. The correlation between the Total Score of the EQ-i 2.0 and the Watson-Glaser II was not statistically significant ($r = -.05$; $p = .62$). Regarding the subscales of the Watson-Glaser II, the EQ-i 2.0 Total EI score was also uncorrelated with the Recognize Assumptions ($r = .03$; $p = .76$) and Draw Conclusions ($r = .02$, $p = .84$) subscales, but was significantly negatively correlated with the Evaluate Arguments subscale ($r = -.25$, $p < .01$). Watson and Glaser (2009) state that lower scores on the Evaluate Arguments subscale may be found in individuals who allow high levels of emotion to "cloud objectivity and the ability to accurately evaluate arguments" (p. 3). This trend was also found for the EQ-i 2.0 composite scales and subscales. That is, the majority of EQ-i 2.0 composite scales and subscales were uncorrelated with the Watson-Glaser II Total Score and the Recognize Assumptions and Draw Conclusions subscales, but were negatively correlated with the Evaluate Arguments subscale. These results provide support for the independence of EI and cognitive intelligence; however, they also demonstrate the impact of emotional skills on the ability to effectively evaluate arguments.

In summary, strong evidence has been provided that the EQ-i 2.0 measures the constructs it was designed to measure. It shows strong correlations with measures of similar constructs, and little or no correlation with measures of divergent constructs.

Group Differences in EQ-i 2.0 Scores

The validity of the EQ-i 2.0 was further evaluated by examining scores among groups that are expected to show differences in EI. Specifically, validity was assessed by examining (a) corporate job success: corporate leaders vs. the general population; (b) academic achievement: individuals with higher (i.e., post-graduate) compared to lower (high school or less) levels of education; and (c) clinical group differences: individuals with a diagnosed psychological illness vs. a demographically matched control group.

Relationship between EQ-i 2.0 and Corporate Job Success

Occupational success is one highly relevant, consistent, and important outcome of high emotional intelligence. Therefore, the EQ-i 2.0 would be validated by showing higher scores among individuals who have excelled in their profession. To test this hypothesis, EQ-i 2.0 scores were compared between 221 corporate leaders (i.e., CEOs and other C-level leaders,

senior executives, directors, and managers; see Table A.27 for demographics) and the normative sample. Results are displayed in Table A.28. Relative to the normative mean score of 100, leaders scored consistently higher on the EQ-i 2.0 Total EI score and all composite scales and subscales. Leaders produced a mean score of 112.2 (*SD* = 11.7) on the Total EI score, which represents a large difference when compared to the normative average (*d* = 0.82). Mean scores on the composite scales and subscales ranged from 104.2 (*SD* = 14.0; Impulse Control) to 113.1 (*SD* = 10.4; Self-Actualization), with most differences representing medium or large effects. These results indicate that occupational success, measured by one's advancement into a senior-level corporate position, is related to greater emotional intelligence.

Relationship between EQ-i 2.0 Scores and Academic Achievement

Academic achievement is another key outcome related to emotional intelligence. Therefore, EQ-i 2.0 scores are expected to be higher among individuals who have achieved higher levels of accomplishment in educational pursuits. EQ-i 2.0 scores were compared between individuals in the normative sample who achieved a post-graduate degree (e.g., M.A., Ph.D., MBA; *N* = 402) and those who progressed no farther than a high school degree (*N* = 1,451). Comparisons were conducted using analysis of covariance (ANCOVA) for the EQ-i 2.0 Total EI score and two multivariate analyses of covariance (MANCOVA) for the subscales and composite scales, with age group, gender, and race/ethnicity (White vs. non-White) included as covariates. As illustrated in Table A.29, higher Total EI scores were found for post-secondary graduates (*M* = 103.2, *SD* = 14.8) relative to high school graduates (*M* = 98.1, *SD* = 15.5), showing a small-to-moderate effect size (*d* = 0.33). Post-graduates also scored higher on most of the composite scales and subscales. Scores that showed at least a small difference ranged from Problem Solving (*d* = 0.22) to Self-Actualization (*d* = 0.54), with most differences being found in the Decision Making and Stress Management areas. Overall, the results demonstrate that greater academic achievement tends to be associated with higher EI.

Clinical Group Differences in EQ-i 2.0 Scores

Because emotional intelligence is associated with daily functioning, it is presumed to be lower in individuals with various psychiatric or psychological conditions. Based on this assumption, it follows that differences in EQ-i 2.0 scores should be found between clinical and non-clinical (i.e., general population) individuals. Analysis of covariance (ANCOVA) was used to compare mean EQ-i 2.0 Total EI scores across three groups: general population (or the control group taken from the normative sample), individuals diagnosed as depressed or dysthymic, and individuals with another clinical diagnosis (see Table A.30 for demographic characteristics of the samples). Age, gender, and race/ethnicity were included in the analysis as covariates. This procedure was repeated using two separate multivariate analyses of covariance (MANCOVAs) to examine the EQ-i 2.0 composite scales and subscales. Results (Table A.31) demonstrated a significant effect of clinical status for the EQ-i 2.0 Total EI score (F [2, 221] = 7.89, $p < .01$). Specifically, the mean score for the general population group was higher than each of the depressed/dysthymic and other clinical groups, and each difference approached or exceeded a medium effect size (Cohen's *d* = 0.57 and 0.45, respectively). This trend was replicated for all of the composite scales except Interpersonal. The Interpersonal composite was not significant because there were no differences for Empathy or Social Responsibility. The Interpersonal Relationships subscale, however, did show significant differences between groups. At the subscale level, the effect of the general population group scoring higher than the clinical group was found for more than half of the subscales. The subscales that showed the largest differences were those that would be expected on a conceptual level. For example, the largest differences between the general population and depressed/dysthymic groups were found for the Self-Regard and Happiness subscales. These results provide further evidence for the validity of the EQ-i 2.0.

Comparisons among Racial/Ethnic Groups

The examination of potential racial or ethnic bias is always of critical importance in the development of an assessment. Specifically, it is vital to ensure that assessment scores do not show large differences among racial/ethnic groups when they are not expected to. For the EQ-i 2.0, test bias was examined by comparing mean scores across various racial/ethnic groups (White, Black, Hispanic/Latino) in the normative sample. Analysis of covariance (ANCOVA) was used to compare these three groups on the EQ-i 2.0 Total EI score, using gender, age group, and education level as covariates (in order to control for the effects of these demographic variables). Two separate multivariate analyses of covariance (MANCOVAs) were used to examine the composite scales and subscales. Results demonstrated that the effect of race/ethnicity on EQ-i 2.0 scores was statistically significant; however, the effect sizes were in the small-to-medium range. In scales that did show differences, Black and Hispanic/Latino respondents generally showed slightly higher scores than White respondents, though these differences were typically only a few standard score points in magnitude (see Table A.32). These results demonstrate that the EQ-i 2.0 does not show strong differences among racial/ethnic groups and there was no evidence of test bias toward minority groups.

Validity Scale Validation

Dishonest or exaggerated responses are always a concern with self-report instruments. Insincere responses undermine the veracity of an individual's scores on a self-report assessment, which can have significant consequences. The original EQ-i included three scales—Positive Impression, Negative Impression, and Inconsistency Index—to detect illegitimate response styles. These scales were also developed for the EQ-i 2.0. Validity studies were conducted in order to determine if the Validity scales do, in fact, capture positive, negative, and/or inconsistent response styles.

Positive Impression and Negative Impression Scales

Positive and negative impression styles might be used intentionally or unintentionally when responding to a self-report questionnaire. Positive impression occurs when an individual responds to questions in such a way as to make themselves appear in an unrealistically positive light. The reasons behind positive impression include self-deception, lack of insight, an unwillingness to face one's limitations, or various needs such as social conformity, approval, self-protection, or avoidance of criticism (Crowne & Marlowe, 1964; Edwards, 1966; Frederiksen, 1965; Jackson, 1974). An attempt to make a positive impression is more apt to occur when, for example, one is applying for a job, seeking admission to an educational institution, or simply trying to impress someone. Conversely, a negative impression style consists of making oneself appear in an unrealistically negative light. Elevated negative impression scores can be caused by low self-esteem, or various needs such as attention, sympathy, or help in resolving personal problems (Crowne & Marlowe, 1964; Frederiksen, 1965; Jackson, 1974). To detect these response styles in the EQ-i 2.0, Positive Impression (PI) and Negative Impression (NI) scales were developed (see chapter 12). PI and NI scales are traditionally validated by examining the scores of individuals who are motivated to present themselves favorably or unfavorably, respectively, to individuals who respond to the assessment under standard instructions without such motivation. The PI and NI scales were validated using a standard between-subjects simulation study conducted during the norming phase of development. Participants were given instructions designed to elicit either a positive or negative response style while completing the EQ-i 2.0. Instructions designed to elicit a positive response style asked the respondent to imagine they are completing the EQ-i 2.0 as part of an application for a highly desirable job, and must therefore try to give themselves the highest scores possible. Instructions for the negative response style condition asked respondents to imagine they are completing the EQ-i 2.0 as part of a mandatory application for a mentoring program that he or she does not want to participate in, and must therefore try to give themselves the lowest scores possible in order to be selected out of the program. Two demographically-matched control groups who completed the EQ-i 2.0 under standard instructions were selected for comparison with the two simulation groups. Presumably, PI and NI scores would be higher in individuals who were instructed to simulate positive or negative response styles, respectively, than those who responded under standard conditions.

We checked several possible cut-scores for the NI and PI scales. Within the normative sample, at a cut-score of 1, 20% to 40% of the normative sample would be flagged as possibly responding with an overly positive or negative response style, and at a cut-score of 2, these values decreased to 5% to 16%. These values were deemed too large, that is, we did not want to be flagging such a large proportion of test-takers. At a cut-score of 3, 2% to 6% of people were flagged, and at a cut-score of 4, less than 1% of the normative sample was flagged. The cut-score of 4 was deemed too stringent, in that we would not be flagging enough people; therefore, we tested the cut-score of 3 by comparing this result in the normative versus the simulation study samples.

Results from the simulation studies are displayed in Table A.33. As expected, PI scores from the positive response style group were significantly higher than those in the control group. The difference between the two groups is quantified as a medium-to-large effect size. Similarly, NI scores from the negative response style group were significantly higher than those in the control group. This difference exceeded the standard guideline for a large effect size. These results provide support for the validity of the PI and NI scales.

Inconsistency Index

Inconsistent responding occurs when a respondent rates similar items in dissimilar or opposite ways. For example, a respondent who endorses (i.e., responds "Always/Almost Always") both of the items "I like parties" and "I don't like parties" would be responding inconsistently. Like positive impression and negative impression styles, inconsistent responding might occur intentionally or unintentionally. Various reasons for inconsistent responding include deliberate sabotage or noncompliance, fatigue, incomprehension of the items or instructions, inattention, disinterest, and a lack of motivation.

To detect inconsistent responding in the EQ-i 2.0, an Inconsistency Index (IncX) was developed. This scale is comprised of 10 pairs of highly related items, which should elicit similar responses within each pair of items. If the respondent provides very different ratings to several pairs of items that should be rated similarly, then inconsistent responding may be suspected (see chapter 8). Traditionally, inconsistency scales are validated by comparing scores generated from individuals who respond to assessment items randomly, to individuals who respond under standard conditions. These

random protocols can be generated by human respondents or computer programs. A computer program (IBM SPSS Statistics 19.0.0, 2010) was used to generate a data set of 4,000 random EQ-i 2.0 response sets to compare to the normative data. Evidence of the validity of the IncX would be demonstrated if the cutoff identified a large proportion of the random response sets, and if IncX scores were higher, on average, than those in a control sample. Furthermore, these results would provide independent validation of the choice of cutoff to be used to identify scores as potentially invalid that was developed from the normative sample. Table A.34 illustrates the proportion of response sets at each IncX raw score. Results demonstrated that a score of 3, which identified only 3.5% of the normative sample as potentially inconsistent, identified 93.3% of the random response sets as potentially inconsistent. Furthermore, mean IncX scores were dramatically higher in the random sample than in the normative sample (d = 3.36; Table A.34), a difference that easily exceeded the criteria for a large effect size. These results demonstrate a high degree of predictive validity for the EQ-i 2.0 IncX.

Validity Summary

Several analyses were conducted to examine the validity of the EQ-i 2.0. Content validity analyses suggest that all relevant facets of the Bar-On conceptualization of EI are being captured by the EQ-i 2.0. Exploratory factor analyses suggested that this overarching single factor (EI) may be represented by 15 correlated subscales, which in turn may be combined into five correlated composite scales (i.e., a 1-5-15 Factor Model of Emotional Intelligence). This factor structure was corroborated through confirmatory factor analyses. Correlations among the composite scales and subscales provide support for the unidimensionality of the EQ-i 2.0. Validity was supported by expected correlations with the original EQ-i and measures of social skills and general personality, as well as a lack of correlation with measures of ability-based EI and cognitive intelligence. Further validity evidence was provided by expected group differences with regard to occupational success, academic achievement, and psychological adjustment. Comparisons among racial/ethnic groups in the normative sample provided no evidence for racial/ethnic bias against minority groups in the EQ-i 2.0. The validity scales (Positive Impression, Negative Impression, and Inconsistency Index) were validated through expected differences in scores between known invalid responses and those of control groups. Overall, the analyses suggest that the EQ-i 2.0 is a valid measure of EI.

EQ 360 2.0 Pilot Study and Standardization

This section describes the EQ 360 2.0 standardization procedure, including the method of data collection, the properties of the normative sample, and the effects of age and gender on the results.

Data Collection

Data collection for the EQ 360 2.0 followed multiple stages between July 2009 and August 2010. More than 4,000 participants completed the EQ 360 2.0 over this time period.

Pilot Phase

The first stage of data collection, the collection of pilot data, took place between July 2009 and November 2009. Raters were required to provide demographic information of the individuals they rated (i.e., "ratees") along with EQ 360 2.0 ratings. The ratees (N = 759) were 59.2% female, the majority were White (74.3%), and there was good representation across several age groups (Table A.35). These data were collected to ensure the basic functionality of the EQ 360 2.0 (e.g., instructions, response options, administration time) was adequate.

Normative Phase

The second phase of data collection that included the collection of data for the normative sample, as well as reliability and validity data, took place between March 2010 and August 2010. Data were gathered from all 50 U.S. states and the District of Columbia, as well as from all 10 Canadian provinces. Raters were sent an email invitation to participate in the EQ 360 2.0 data collection process. The data collection and authentication procedures were identical to those used for the EQ-i 2.0 (see EQ-i 2.0 – Data Collection – Normative Phase section earlier in this chapter). The following section focuses on a description of the normative samples; see Reliability and Validity later in this chapter for more information on the reliability and validity samples.

In order to create representative normative samples, specific demographics (i.e., age, gender, race/ethnicity, and geographic targets), guided by recent Canadian and U.S. Census information (i.e., Statistics Canada, 2006; U.S. Bureau of the Census, 2008), were utilized during the data collection procedure. Information was collected on each ratee's gender, age, race/ethnicity (Asian/Pacific Islander, Black/African-American/African-Canadian, Hispanic/Latino, White, Multiracial, and Other), employment status (employed/self-employed, unemployed, retired, and other), and geographic location (state/province and country). For ease of presentation, race/ethnicity groups are referred to in this manual as follows:

Black, Hispanic/Latino, White, and Other. For the EQ 360 2.0, this information about the ratee (i.e., the person being rated) was provided by the rater (i.e., the person completing the assessment). Information about the type and strength of the rater-ratee relationship was also collected.

Standardization

The standardization process for the EQ 360 2.0 was similar to that of the EQ-i 2.0. A second normative dataset was collected for the EQ 360 2.0, requiring separate norms and statistical analyses.

Normative Sample

Normative data for the EQ 360 2.0 were collected concurrently with the EQ-i 2.0, during March 2010 and April 2010. Data for the EQ 360 2.0 required raters to rate an individual ("the ratee") on the EQ 360 2.0 (including the collection of various demographic information about both themselves and the ratees). During this time period, 3,413 participants provided EQ 360 2.0 data for standardization purposes. From these data, a demographically and geographically representative database of 3,200 ratees was selected as the EQ 360 2.0 normative sample. Statistical analyses showed no strong differences between U.S. and Canadian participants in EQ 360 2.0 scores (Table A.36); therefore, data from both countries were included in the normative sample.

Rater Description. The sample of 3,200 raters (i.e., the participants providing the ratings) was 59.2% female, with a mean age of 46.8 years, (*SD* = 13.5 years). The sample was primarily White (81.2%), 5.2% were Black, 3.7% were Hispanic/Latino, and 9.9% were of other races/ethnicities. Approximately one-third of the sample was from the U.S. South (33.7%), while 22.0% was from the U.S West, 20.5% was from the U.S. Midwest, 16.1% was from the U.S. Northeast, 5.6% was from Central Canada, 0.9% was from the Canadian West and Prairies, and 0.3% was from the Canadian East. More than half of the raters had at least a college/university education (54.7%), 27.8% had some college/university education, and 17.6% had a high school diploma or less. The majority (90.4%) of raters knew the ratee for over a year (see Table A.37) and over half of the raters stated that they knew the ratee "Well" or "Very Well" on a four-point scale ranging from Not Very Well (0) to Very Well (3; see Table A.38). Therefore, the raters knew the ratees for long enough, and well enough, to provide valid EQ 360 2.0 ratings.

Ratee Sample. The normative sample was stratified to match the Census based on the ratee's (i.e., the person being rated) demographic characteristics. The sample included an equal ratio of males to females, stratified equally across four rater types: direct report (i.e., the ratee is the rater's manager), manager (i.e., the ratee is the rater's direct report), work peer, and friend/family member (Table A.39). Participants were proportioned similarly across most of the age groups, although there were relatively fewer at the lower age range, as an attempt was not made to collect direct-report data for managers under the age of 25 (Table A.40) as they are relatively rare in the population. Race/ethnicity was stratified by Census figures within rater type, given that these distributions differed slightly across rater type (Table A.41). The normative sample met each of these targets within 4%, and was within 1% in most cases. Finally, there was good representation from all U.S. and Canadian geographic regions (Table A.42).

Focus on Effects Size. The effects of gender, age, and rater type were examined in the EQ 360 2.0 normative data. As with the EQ-i 2.0 data, the large EQ 360 2.0 normative sample size dictates that effect sizes should be considered more strongly than significance tests (see section on effect sizes earlier in this chapter). Cohen's *d* values are reported to describe the size of gender effects, and partial eta-squared (partial η^2) values are used to describe the effects of age and rater type.

Norming Procedures

Similar to the EQ-i 2.0, the first step in the EQ 360 2.0 norming procedure was to determine if any demographic trends existed in the data. Demographic effects were examined using an analysis of covariance (ANCOVA) for the EQ 360 2.0 Total EI score and two separate multivariate analyses of covariance (MANCOVA) for the composite scales and subscales. Rater type (direct report, manager, work peer, family/friend), gender, and age group were examined using race/ethnicity (White vs. non-White) as a covariate. In an attempt to control for Type I errors that might occur with multiple analyses, a more conservative criterion of $p < .01$ was used for all *F*-tests. Results at the multivariate level revealed significant effects of gender, age, and rater type for both the composites and the subscales (Table A.43); the only significant interaction at the multivariate level was for the interaction of age and rater type for the subscales. Given these results, the univariate effects are described in detail next.

Overall, gender and age effects were less pronounced in the EQ 360 2.0 normative sample than they were in the EQ-i 2.0 sample (see Table A.44 for effect sizes and Tables A.45 through A.47 for descriptive statistics and significance test results). There were no gender differences that reached even a small effect size for the Total EI score or for any of the composite scales. At the subscale level, only Emotional Expression reached a small effect size, with females being rated higher than males. With respect to age, Independence, Social Responsibility, Impulse Control, and Flexibility reached small effect sizes. For Independence, Social Responsibility, and Impulse Control, the effect was attributable to lower scores

among 18–29-year-olds. For Flexibility, scores decreased in the older age groups. Very few meaningful differences were found across rater types. No meaningful differences were found across rater types for the EQ 360 2.0 Total EI score (i.e., partial η^2 = .00). Some minor differences were found across rater types for the composite scales and subscales, but all were small effect sizes (i.e., partial η^2 lower than .06). None of the age × rater type interactions reached significance at the univariate level, with the exception of Problem Solving (F [12, 555.80] = 2.55, p = .002); however, the effect size was very small (partial η^2 = .01).

Overall, the lack of meaningful demographic effects suggested it was unnecessary to create specific rater type-, age-, or gender-based norms for the EQ 360 2.0. Therefore, only overall (General Population) norms are available for the EQ 360 2.0. These norms were created using the same procedure as the EQ-i 2.0 General norms, but without the smoothing process (given no age groups were utilized). Standard scores (with a mean of 100 and standard deviation of 15) were computed for all scales. Skewness and kurtosis statistics (e.g., -0.42 and -0.34, respectively, for Total EI; see Figure A.2) were not large enough to suggest a normalizing transformation was necessary for the EQ 360 2.0 scores.

Standardization Summary

More than 4,000 assessments were collected between 2009 and 2010 in the standardization of the EQ 360 2.0. A sample of 3,200 participants was chosen as the EQ 360 2.0 normative sample. The sample was evenly distributed by gender and rater type, and matched to the census based on race/ethnicity. Statistical analyses revealed a lack of meaningful differences in EQ 360 2.0 scores across gender, age group, or rater type. Therefore, a single normative group was created. The norming process resulted in standard scores with means of 100 and standard deviations of 15 for the Total EI score, composite scales, and subscales. The following sections describe the psychometric properties (i.e., reliability and validity) of the EQ 360 2.0.

EQ 360 2.0 Reliability

Similar to the EQ-i 2.0, reliability analyses were conducted for the EQ 360 2.0. Specifically, internal consistency and test-retest reliability analyses were performed. A practical application of these analyses is to detect discrepancies between self (EQ-i 2.0) and rater (EQ 360 2.0) scores.

Internal Consistency

Internal consistency conveys the degree to which a set of items are associated with one another. High levels of internal consistency suggest that the items are measuring a single, cohesive construct. Internal consistency is typically measured using Cronbach's alpha (Cronbach, 1951), which ranges from 0.0 to 1.0 with higher values reflecting higher internal consistency.

Cronbach's alpha values for the EQ 360 2.0 normative sample are displayed in Table A.48. Similar to results found in the EQ-i 2.0 normative samples, most of these values ranged from good to excellent for the Total EI score, composite scales, and subscales, with all but one value reaching at least .82.

Self-to-Rater Gaps: Comparing EQ-i 2.0 to EQ 360 2.0 Scores

The EQ 360 2.0 report includes a section that compares scores from self-ratings to scores from the rater groups. The process used to calculate confidence intervals and gaps between subscales for the EQ-i 2.0 report was again used to determine if the self to rater comparison revealed similar scores, or gaps between scores. Considering statistical results as well as practical functionality, results revealed that a critical value of 10 points was appropriate as the criterion for identifying self-to-rater gaps. This value is actually slightly smaller than those suggested by the statistical analyses, but was selected so that the user can be confident they are identifying any potentially important discrepancies between self and observer ratings of EI abilities. For example, self-report and rater-group subscale scores less than 10 points apart will be reported as being similar, while subscale scores that are 10 or more points apart will be reported as having a gap.

Test-Retest Reliability and Stability

Similar to the EQ-i 2.0, test-retest reliability and stability were evaluated for the EQ 360 2.0. Test-retest reliability was calculated by examining the correlation between an individual's scores in two assessments, separated by a meaningful amount of time. Test-retest stability analyses were performed by calculating the difference between Time 1 and Time 2 standard scores for each individual in the test-retest sample.

For the EQ 360 2.0 sample, test-retest data was available for 203 individuals who were assessed roughly three weeks apart (mean interval = 19.30 days, SD = 2.44 days, range = 14–23 days). Demographic characteristics of the ratees (i.e., the people being rated) in the retest sample are displayed in Table A.49. Test-retest correlations (Table A.50) were high for the EQ 360 2.0 Total EI score, composite scales, and subscales, ranging from r = .76 to .89.

Similar to the EQ-i 2.0, EQ 360 2.0 test-retest stability values were calculated as the difference between Time 1 and Time 2 standard scores. Table A.51 displays the frequencies of these differences (positive differences indicate that scores increased over time whereas negative differences indicate that scores decreased over time), as well as the mean differences (i.e., the difference between Time 1 and Time 2 ratings for

each individual averaged across the samples) and the 95% confidence intervals surrounding the mean differences. The results suggest scores were similar to those found in the EQ-i 2.0 samples: for all subscales, roughly 90% or more of individuals' scores did not change by more than one normative standard deviation (i.e., 15 standard score points) over time For instance, 95.1% of EQ 360 2.0 Total EI scores deviated by less than one standard deviation over time. The mean difference was -0.18 standard score units, and the 95% confidence interval (-0.93; 0.57) contained zero. These results provide support that the EQ 360 2.0 captures the temporal stability of emotional intelligence, even when rated by outside observers.

Reliability Summary

Overall, the EQ 360 2.0 demonstrates sound reliability. Internal consistency (alpha) values were generally high for the overall normative group, suggesting that the items cohesively measure Total EI as well as the constructs measured by the composite scales and subscales. Test-retest reliability and stability values were also high, reflecting a level of temporal stability that would be expected for emotional intelligence. Users of the EQ 360 2.0 can be confident that the scores generated by these assessments will be consistent and reliable.

EQ 360 2.0 Validity

EQ 360 2.0 validity analyses were performed to ensure that the validity of the observer-rated version of the EQ-i 2.0 is comparable to the self-report version. These analyses are summarized in the following section. Specifically,

- the factor structure of the EQ 360 2.0 was examined through correlations among the composite scales and subscales;
- EQ 360 2.0 scores were compared to EQ-i 2.0 scores to evaluate self-other agreement (correlations) and self-other consistency (differences between EQ 360 2.0 and EQ-i 2.0 scores); and
- multiple regression analyses were conducted to determine the ability of the EQ 360 2.0 to correlate with a measure of social adjustment—the Social Adjustment Scale–Self-Report (Weismann, 1999)—independently of EQ-i 2.0 scores (i.e., to examine the added value of the EQ 360 2.0).

Following these results, analyses examining potential bias of raters in relation to the race/ethnicity of ratees will be illustrated, (that is, the degree to which White and non-White observers rate Black, Hispanic/Latino, and White ratees similarly).

Based on these results, practical implications of the validity analyses include the use of EQ 360 2.0 assessments to inform decisions in occupational settings such as initial hiring or subsequent promotion, or acceptance into academic institutions, or the added value of using multiple sources (i.e., self-report, observer reports) in gathering this information about individuals, with the confidence that ratings are not affected by demographic variables.

Correlations among EQ 360 2.0 Composite Scales and Subscales

Correlations among the EQ 360 2.0 composite scales and subscales were examined in the normative sample to determine if the pattern of results found in the EQ-i 2.0 normative sample data would be replicated. Tables A.52 (Composite Scales) and A.53 (Subscales) display these correlations. These correlations were strong, and in most cases stronger than in the EQ-i 2.0 normative sample. Composite scale correlations ranged from $r = .64$ (Self-Expression/Interpersonal) to $r = .86$ (Decision Making/Stress Management). For the most part, subscale correlations were especially strong within the same composite, as expected (see shaded cells in Table A.53). Each of these values exceeded a medium effect size and most exceeded a large effect size, ranging from $r = .37$ (Emotional Expression/Independence) to $r = .81$ (Empathy/Interpersonal Relationships). These results suggest the composite scales and subscales share a relevant underlying factor (i.e., emotional intelligence), similar to that found in the EQ-i 2.0.

Relationship between the EQ 360 2.0 and the EQ-i 2.0

Associations between self- and other-ratings serve as another source of a scale's validity. The EQ 360 2.0 can be validated by finding a strong level of agreement between EQ 360 2.0 and EQ-i 2.0 scores. In order to assess the association between self and observer ratings, a sample of 108 participants rated themselves on the EQ-i 2.0 and were also rated by a rater on the EQ 360 2.0. Most of the EQ 360 2.0 ratings were provided by family members or spouses (65.7%) or a friend (21.3%). Most (97.2%) of the raters knew the person they were rating for at least one year, with 81.5% of the raters stating that they knew the person they were rating "Very Well" (on a 4-point scale ranging from "Not Very Well" to "Very Well") and 76.9% stating that they interacted with the person "Very Often" in the past month (on a 4-point scale ranging from "Occasionally" to "Very Often"). A breakdown of the sample (i.e., those who provided self-ratings and were also rated by others) is presented in Table A.54.

Correlations between the EQ 360 2.0 and the EQ-i 2.0 (Self-Other Agreement)

The correlation between the EQ-i 2.0 and EQ 360 2.0 Total EI scores was $r = .60$, $p < .01$ (Table A.55). Correlations for the composite scales and subscales were all significant at

$p < .01$, and almost every correlation reached the criterion for a large effect size. Specifically, the correlations ranged from $r = .44$ (Stress Tolerance) to $r = .72$ (Happiness). These results suggest that self-other agreement for the EQ 360 2.0 (and EQ-i 2.0) is strong. Moreover, this pattern suggests that EI as measured by the EQ-i 2.0 and EQ 360 2.0 is a robust trait that is evaluated similarly via self-report and external observers. However, these correlations are not high enough to suggest redundancy; each measure is assessing unique information about the individual and both types of scores provide important information. Specifically, self-ratings will not always align with observer ratings.

Comparing Scores on the EQ 360 2.0 and EQ-i 2.0 (Self-Other Consistency)

To supplement the correlational results between the EQ 360 2.0 and EQ-i 2.0, standard scores were compared between the two measures. The correlations compare the rank order of individuals on the EQ 360 2.0 and EQ-i 2.0. That is, high correlations between the two measures suggest that individuals who are rated as high in EI by observers (EQ 360 2.0) also have high self-report (EQ-i 2.0) scores, and individuals with low EQ 360 2.0 ratings also have low EQ-i 2.0 scores. However, the EQ 360 2.0 and EQ-i 2.0 ratings themselves may be quite different on an absolute level. For example, scores on the EQ 360 2.0 may be dramatically and uniformly lower than EQ-i 2.0 ratings, but as long as the rank-order of the ratings remains similar across the two measures, the correlation between the two will be high. Examining the degree to which EQ 360 2.0 and EQ-i 2.0 standard scores differ will help determine the nature of the relationship between the EQ-i 2.0 and EQ 360 2.0. These analyses also summarize the consistency of scores between self- and other-ratings.

EQ 360 2.0 and EQ-i 2.0 standard scores were compared by calculating a difference score between the two measures, which consisted of subtracting each EQ 360 2.0 standard score from its corresponding EQ-i 2.0 standard score. Therefore, a positive difference represents higher EQ-i 2.0 scores relative to EQ 360 2.0 scores, and a negative difference represents higher EQ 360 2.0 scores relative to EQ-i 2.0 scores. Recall that the criterion for describing a meaningful difference between self- and other-ratings was determined to be 10 standard score points (see chapter 6). Difference scores are displayed in Table A.56 to summarize the proportion of difference scores that fall above or below 10 standard score points. Just over half of EQ 360 2.0 and EQ-i 2.0 scores fell within 10 points of each other for the Total EI score and all composite scales and subscales. Overall, the results demonstrate a good degree of consistency between EQ 360 2.0 and EQ-i 2.0 scores; however, the fact that large differences are observed for close to half of the sample demonstrates the importance of collecting both self and observer ratings.

Associations among EQ-i 2.0, EQ 360 2.0, and SAS-SR

Emotional intelligence tends to show consistent associations with general adjustment. Social adjustment—as measured by the Social Adjustment Scale–Self-Report (SAS–R, Weissman, 1999)—should therefore show strong associations with the EQ-i 2.0 and EQ 360 2.0. The SAS–SR is a 54-item self-report scale intended to measure "instrumental and expressive role performance" (p. 1) in six major areas of functioning: work (employed, homemaker, or student); social and leisure activities; relationships with extended family; role as a marital partner; parental role; and role within the family unit. Across these six role areas, SAS–SR questions cover four qualitative categories: performance at expected tasks; the amount of friction with people; finer aspects of interpersonal relations; and feelings and satisfactions. Items are rated on a five-point rating scale with higher scores reflecting higher levels of impairment.

The independent associations of the EQ-i 2.0 and EQ 360 2.0 to SAS-SR scores were examined through multiple regression analyses, to shed light on the unique contributions of observer EI ratings in predicting social adjustment over self-report ratings, and vice-versa. The demographic description of the participants in this sample is displayed in Table A.57, and Table A.58 displays the results of the analyses. Correlations with the SAS-SR for both the EQ-i 2.0 and EQ 360 2.0 were mostly strong and in the expected direction (correlations are negative because high SAS-SR scores reflect social maladjustment). Stepwise multiple regression analyses were then performed in two steps. In the first step, only the EQ-i 2.0 scale was entered as a predictor, with SAS-SR scores as the outcome. In the second step, the EQ-i 2.0 scale and the EQ 360 2.0 scale were entered simultaneously. Therefore, it is possible to evaluate the independent associations of each scale with the SAS-SR. This analysis was conducted separately for each composite scale, subscale, and Total EI. For the Total EI score as well as most of the composite scales and subscales, both the EQ-i 2.0 and EQ 360 2.0 scales were independently related to the SAS-SR Total Score at the $p < .05$ significance level. In other words, self-report and observer ratings were each uniquely informative of SAS-SR scores.

A final set of statistics relevant to these analyses is the R^2 change (Table A.58). This statistic communicates the amount of explanatory power the EQ 360 2.0 scale adds to the prediction of SAS-SR scores after accounting for its respective EQ-i 2.0 scale. In other words, the incremental validity of the EQ 360 2.0 scores can be quantified. The strongest effects were found for the Empathy and Reality Testing subscales and the Interpersonal composite. Overall, the pattern of results showed expected associations between EI and social adjustment for both the EQ-i 2.0 and the EQ 360 2.0. The

EQ-i 2.0 and EQ 360 2.0 subscales and composite scales provided unique and incremental contributions towards social adjustment.

Examination of Potential Race/Ethnicity Effects in the Rater-Ratee Relationship in the EQ 360 2.0

Another important issue related to EQ 360 2.0 ratings is whether a race/ethnicity bias exists. That is, neither the race/ethnicity of the ratee nor the race/ethnicity of the rater should have an affect on EQ 360 2.0 scores. Analysis of covariance (ANCOVA) was used to examine these potential effects in the EQ 360 2.0 Total EI score, using rater race/ethnicity (White vs. non-White) and ratee race/ethnicity (Black vs. Hispanic/Latino vs. White) as independent variables, and ratee gender and age group as covariates. Two separate multivariate analyses of covariance (MANCOVAs) were used to examine the composite scales and subscales. Specifically, a significant or meaningful interaction between the two independent variables would provide evidence that raters' race/ethnicity is influencing differences in ratings of White, Black and Hispanic/Latino ratees. Table A.59 demonstrates that this was not the case in the EQ 360 2.0 normative sample. The Wilk's lambda values suggested that only a negligible amount of variance could be explained by the interaction between rater and ratee race/ethnicity. The interaction terms were not significant at the $p < .01$ level, and none of the effect sizes met the minimum requirements for even a small effect size (i.e., $\eta^2 = .01$). These results illustrate that raters did not show differences in their ratings based on the ethnicity of the ratees.

Validity Summary

Several validity analyses were conducted for the EQ 360 2.0. Support for the factor structure, as identified in the EQ-i 2.0, also emerged in the EQ 360 2.0. The validity of the EQ 360 2.0 was further supported through comparisons with the EQ-i 2.0 (self-other agreement and consistency) and a measure of social adjustment (unique and incremental validity relative to the EQ-i 2.0). There was no evidence of bias in relation to the race/ethnicity of the rater or the ratee. Overall, the analyses suggest the EQ 360 2.0 is a valid measure of EI.

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Appendix A

This appendix details the statistical results pertaining to the standardization, reliability, and validity of the EQ-i® 2.0 and EQ 360® 2.0, as summarized in chapter 13. Please see chapter 13 for full interpretive text.

EQ-i 2.0 Tables and Figures

Table A.1. Demographic Characteristics of EQ-i 2.0 Pilot Data

The following table summarizes the demographic characteristics of the EQ-i 2.0 pilot data. Ideally, pilot data should include representation from a wide range of demographic (gender, age, race, education level) groups, as was the case in the EQ-i 2.0 pilot data.

Demographic		*N*	%
Gender	Male	554	41.2
	Female	792	58.8
Age Group (Years)	18–24	586	43.5
	25–29	285	21.2
	30–34	208	15.5
	35–39	163	12.1
	40–44	104	7.7
Race/Ethnicity	Black	107	7.9
	Hispanic/Latino	124	9.2
	White	1,008	74.9
	Other	107	7.9
Education Level	High School or Less	280	20.8
	Some College/University	447	33.2
	College/University or Higher	615	45.7
	Missing	4	0.3
	Total	**1,346**	**100.0**

Table A.2. Comparison of EQ-i 2.0 Scores in U.S. and Canadian Samples

The following table provides mean and standard deviations of EQ-i 2.0 scores in U.S. and Canadian samples. *d* values provide an effect size to describe differences between the two countries as small, medium, or large. *F* and *p* values provide statistical significance tests for these differences. A lack of meaningful (i.e., $|d| \geq .20$) differences between U.S. and Canadian participants supports combining the two countries in the normative sample, as was the case in the EQ-i 2.0 data.

Scale		U.S.	Canada	*d*	*F*	*p*
Total EI	*M*	98.9	99.5	-0.04	0.74	.391
	SD	15.4	15.5			
Self-Perception Composite	*M*	99.8	100.1	-0.02	0.21	.646
	SD	15.3	15.4			
Self-Regard	*M*	99.1	100.0	-0.06	1.57	.210
	SD	14.9	15.0			
Self-Actualization	*M*	100.5	100.7	-0.01	0.07	.789
	SD	15.3	15.4			
Emotional Self-Awareness	*M*	99.9	99.6	0.02	0.27	.606
	SD	15.3	15.4			
Self-Expression Composite	*M*	98.4	99.1	-0.04	0.85	.358
	SD	15.3	15.4			
Emotional Expression	*M*	99.2	99.2	0.00	0.00	.991
	SD	15.2	15.3			
Assertiveness	*M*	100.1	100.4	-0.02	0.16	.689
	SD	14.9	15.0			
Independence	*M*	97.2	98.4	-0.08	3.22	.073
	SD	15.2	15.3			
Interpersonal Composite	*M*	99.6	100.7	-0.07	2.10	.147
	SD	15.3	15.4			
Interpersonal Relationships	*M*	99.3	100.4	-0.08	2.68	.102
	SD	15.3	15.4			
Empathy	*M*	99.8	100.1	-0.02	0.28	.596
	SD	15.2	15.3			
Social Responsibility	*M*	100.1	101.3	-0.08	3.01	.083
	SD	15.1	15.2			
Decision Making Composite	*M*	98.5	97.3	0.07	2.56	.109
	SD	15.5	15.6			
Problem Solving	*M*	97.8	97.5	0.02	0.14	.710
	SD	15.3	15.4			
Reality Testing	*M*	99.9	99.6	0.02	0.11	.739
	SD	15.3	15.3			
Impulse Control	*M*	99.0	96.7	0.14	9.64	.002
	SD	15.5	15.6			
Stress Management Composite	*M*	98.7	100.2	-0.10	4.84	.028
	SD	15.1	15.1			
Flexibility	*M*	98.1	99.7	-0.10	4.89	.027
	SD	15.1	15.2			
Stress Tolerance	*M*	99.0	100.2	-0.08	2.76	.097
	SD	14.8	14.9			
Optimism	*M*	99.5	100.6	-0.08	2.63	.105
	SD	15.2	15.3			
Happiness	*M*	99.6	100.8	-0.08	2.69	.101
	SD	15.2	15.3			

Note. Sample size ranges (due to missing data): U.S., *N* = 5,902 to 5,905; Canada, *N* = 507 to 508. *df* for *F*-tests: Total EI = 1, 6407; composite scales = 1, 6406; subscales = 1, 6403. Positive Cohen's *d* values signify higher means in the U.S. group, negative Cohen's *d* values signify higher means in the Canadian group. Guidelines for evaluating $|d|$ are .20 = small, .50 = medium, .80 = large.

Table A.3. Age × Gender Distribution: EQ-i 2.0 Normative Sample

The following table conveys the distribution of EQ-i 2.0 normative sample participants, categorized by age group and gender. An ideal distribution is one that is similarly proportioned across all groups, as was the case in the EQ-i 2.0 normative sample, demonstrating equal representation of all age × gender groups.

Age Group (Years)	Male		Female		Total	
	N	%	*N*	%	*N*	%
18–24	200	5.0	200	5.0	400	10.0
25–29	200	5.0	200	5.0	400	10.0
30–34	200	5.0	200	5.0	400	10.0
35–39	200	5.0	200	5.0	400	10.0
40–44	200	5.0	200	5.0	400	10.0
45–49	200	5.0	200	5.0	400	10.0
50–54	200	5.0	200	5.0	400	10.0
55–59	200	5.0	200	5.0	400	10.0
60–64	200	5.0	200	5.0	400	10.0
65+	200	5.0	200	5.0	400	10.0
Total	**2,000**	**50.0**	**2,000**	**50.0**	**4,000**	**100.0**

Table A.4. Race/Ethnicity Distribution: EQ-i 2.0 Normative Sample

The following table summarizes the race/ethnicity distribution of the EQ-i 2.0 normative sample along with Census information. Ideally, the normative sample should show race/ethnicity proportions similar to the Census, suggesting the normative sample is representative of the general population. The EQ-i 2.0 normative sample showed percentages within 4% for each racial/ethnic group, suggesting it is very similar to the Census.

Country	Race/Ethnicity	*N*	%	Census %
U.S.	Black	410	11.4	12.3
	Hispanic/Latino	432	12.0	15.1
	White	2,519	70.0	66.0
	Other	239	6.6	6.6
	Total	**3,600**	**100.0**	**100.0**
Canada	White	315	78.8	80.0
	Non-White	85	21.3	20.0
	Total	**400**	**100.0**	**100.0**

Table A.5. Geographic Region Distribution: EQ-i 2.0 Normative Sample

The following table summarizes the geographic region distribution of the EQ-i 2.0 normative sample along with Census information. Ideally, the normative sample should show region proportions similar to the Census. The EQ-i 2.0 normative sample showed percentages within 2% for each region, suggesting it is very similar to the Census.

Country	Region	*N*	%	Census %
U.S.	Northeast	655	18.2	18.1
	Midwest	793	22.0	21.9
	South	1,292	35.9	36.7
	West	860	23.9	23.3
	Total	**3,600**	**100.0**	**100.0**
Canada	West	54	13.5	13.0
	Prairies	72	18.0	17.1
	Central	244	61.0	62.4
	East	30	7.5	7.3
	Total	**400**	**100.0**	**100.0**

Table A.6. Education Level Distribution: EQ-i 2.0 Normative Sample

The following table summarizes the education level (i.e., highest level of attained education) distribution of the EQ-i 2.0 normative sample along with Census information. Ideally, the normative sample should show education level proportions similar to the Census, as found in the EQ-i 2.0 normative sample (i.e., the sample was within 3% of Census), suggesting the sample is representative of the general population.

Country	Education Level	*N*	%	Census %
U.S. and Canada	High school diploma or less	1,751	43.8	46.6
	Some college/ university	1,119	28.0	27.2
	College/university graduate or higher	1,130	28.2	26.2
	Total	**4,000**	**100.0**	**100.0**

Table A.7. Multivariate Effects of Age and Gender: EQ-i 2.0

The following table summarizes the results from the multivariate analyses of covariance (MANCOVAs) conducted on the composite scales and subscales to examine potential effects of gender, age, or the interaction between gender and age on EQ-i 2.0 scores in the normative sample. Wilks' lambda ranges from 0.00 to 1.00 and depicts the amount of variance not explained by the demographic variable. *F* and *p* values convey the statistical significance of the demographic variables. Partial η^2 values provide an effect size for describing the effects as small, medium, or large. Meaningful effect sizes (i.e., partial $\eta^2 \geq .01$) suggest differences among participants based on the demographic variable.

Analysis	Demographic Variable	Wilks' Lambda	*F (df)*	*p*	Partial η^2
Composite Scales	Gender	.935	55.56 (5, 3984)	< .001	.07
	Age	.955	9.22 (20, 13214.383)	< .001	.01
	Gender × Age	.989	2.16 (20, 13214.38)	.002	.00
Subscales	Gender	.842	46.56 (15, 3970)	< .001	.16
	Age	.854	10.03 (64, 15544.13)	< .001	.04
	Gender × Age	.973	1.67 (64, 15544.13)	.001	.01

Table A.8. Effect Sizes for Gender and Age Effects in the EQ-i 2.0 Normative Sample

The following table summarizes the effect sizes for the effects of gender, age, and the gender × age interaction on the EQ-i 2.0 Total EI score, composite scales, and subscales in the normative sample. Meaningful effect sizes (i.e., $|d| \geq .20$, partial $\eta^2 \geq .01$), which were found for several EQ-i 2.0 composite scales and subscales, suggest differences among participants based on the demographic variable, and that separate demographic norm groups may be required.

Scale	Gender (Cohen's *d*)	Age (partial η^2)	Gender × Age Interaction (partial η^2)
Total EI	-0.03	.02	.00
Self-Perception Composite	0.02	.01	.00
Self-Regard	0.17	.03	.00
Self-Actualization	0.01	.01	.00
Emotional Self-Awareness	-0.22	.00	.00
Self-Expression Composite	0.01	.02	.00
Emotional Expression	-0.31	.01	.00
Assertiveness	0.19	.00	.00
Independence	0.21	.05	.00
Interpersonal Composite	-0.33	.01	.00
Interpersonal Relationships	-0.18	.01	.00
Empathy	-0.49	.01	.00
Social Responsibility	-0.13	.02	.00
Decision Making Composite	0.11	.02	.00
Problem Solving	0.26	.04	.00
Reality Testing	0.03	.01	.00
Impulse Control	-0.03	.01	.00
Stress Management Composite	0.08	.02	.00
Flexibility	-0.04	.01	.00
Stress Tolerance	0.30	.01	.00
Optimism	-0.06	.02	.00
Happiness	-0.04	.02	.00

Note. $N = 4{,}000$. Positive Cohen's *d* values represent higher scores in males, negative Cohen's *d* values represent higher scores in females. Guidelines for evaluating $|d|$ are .20 = small, .50 = medium, .80 = large. Guidelines for evaluating partial η^2 are .01 = small, .06 = medium, .14 = large.

Table A.9. Gender Differences in EQ-i 2.0 Scores

The following table provides EQ-i 2.0 means and standard deviations for males and females in the normative sample. *F* and *p* values convey the statistical significance of gender differences. *p* values less than .01, which were found for many EQ-i 2.0 composite scales and subscales, suggest significant differences between males and females.

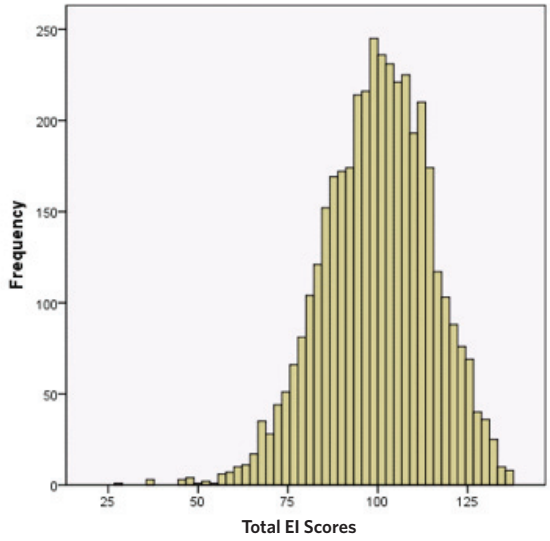
Scale		Male (*N* = 2,000)	Female (*N* = 1,996)	*F* (1, 3985)	*p*
Total EI	*M*	99.8	100.2	0.78	.378
	SD	15.2	15.2		
Self-Perception Composite	*M*	100.1	99.9	0.28	.598
	SD	15.2	15.2		
Self-Regard	*M*	101.3	98.7	27.11	< .001
	SD	15.1	15.1		
Self-Actualization	*M*	100.1	99.9	0.14	.711
	SD	15.2	15.2		
Emotional Self-Awareness	*M*	98.4	101.7	44.28	< .001
	SD	15.3	15.3		
Self-Expression Composite	*M*	100.0	100.0	0.02	.884
	SD	15.3	15.3		
Emotional Expression	*M*	97.6	102.4	93.63	< .001
	SD	15.2	15.2		
Assertiveness	*M*	101.4	98.6	32.76	< .001
	SD	15.3	15.3		
Independence	*M*	101.6	98.5	41.62	< .001
	SD	14.9	14.9		
Interpersonal Composite	*M*	97.5	102.5	101.97	< .001
	SD	15.1	15.1		
Interpersonal Relationships	*M*	98.6	101.4	31.83	< .001
	SD	15.3	15.3		
Empathy	*M*	96.3	103.7	232.15	< .001
	SD	14.9	14.9		
Social Responsibility	*M*	99.0	101.0	16.18	< .001
	SD	15.1	15.1		
Decision Making Composite	*M*	100.9	99.1	12.41	< .001
	SD	15.1	15.1		
Problem Solving	*M*	102.0	98.1	63.84	< .001
	SD	14.9	14.9		
Reality Testing	*M*	100.2	99.8	0.62	.431
	SD	15.3	15.3		
Impulse Control	*M*	99.8	100.2	0.85	.358
	SD	15.3	15.3		
Stress Management Composite	*M*	100.6	99.4	6.15	.013
	SD	15.2	15.2		
Flexibility	*M*	99.7	100.3	1.74	.188
	SD	15.3	15.3		
Stress Tolerance	*M*	102.2	97.8	83.72	< .001
	SD	15.0	15.0		
Optimism	*M*	99.5	100.5	3.68	.055
	SD	15.2	15.2		
Happiness	*M*	99.7	100.3	1.66	.197
	SD	15.2	15.2		

Table A.10. Age Differences in EQ-i 2.0 Scores

The following table provides means and standard deviations for the EQ-i 2.0 Total EI score, composite scales, and subscales for the various age groups in the EQ-i 2.0 normative sample. *F* and *p* values convey the statistical significance of age differences. *p* values less than .01, which were found for many EQ-i 2.0 composite scales and subscales, suggest an overall difference among the age groups.

Scale		18–29 (*N* = 799)	30–39 (*N* = 799)	40–49 (*N* = 800)	50–59 (*N* = 800)	60+ (*N* = 799)	*F* (1, 3985)	*p*
Total EI	*M*	97.0	98.6	100.6	101.3	102.50	17.18	< .001
	SD	14.9	14.9	14.9	14.9	14.90		
Self-Perception Composite	*M*	98.6	98.4	99.8	100.6	102.60	10.47	< .001
	SD	14.9	14.9	14.9	14.9	14.90		
Self-Regard	*M*	97.1	98.1	99.8	101.1	104.00	26.50	< .001
	SD	14.7	14.7	14.7	14.7	14.70		
Self-Actualization	*M*	99.6	98.6	99.8	100.4	101.70	4.72	.001
	SD	14.8	14.8	14.8	14.8	14.80		
Emotional Self-Awareness	*M*	100.2	99.7	100.0	99.8	100.40	0.33	.861
	SD	15.0	15.0	14.9	14.9	14.90		
Self-Expression Composite	*M*	96.5	99.7	101.4	101.2	101.20	15.41	< .001
	SD	14.9	14.9	14.9	14.9	14.90		
Emotional Expression	*M*	97.9	100.3	100.8	100.5	100.50	4.86	.001
	SD	14.9	14.9	14.8	14.8	14.90		
Assertiveness	*M*	100.4	99.7	99.8	99.5	100.80	1.05	.380
	SD	15.0	15.0	14.9	14.9	15.00		
Independence	*M*	93.9	99.4	102.5	102.6	101.70	49.70	< .001
	SD	14.6	14.6	14.5	14.6	14.60		
Interpersonal Composite	*M*	98.3	98.5	99.7	100.9	102.60	11.30	< .001
	SD	14.8	14.8	14.8	14.8	14.80		
Interpersonal Relationships	*M*	98.4	98.9	100.4	100.9	101.60	6.43	< .001
	SD	14.9	15.0	14.9	14.9	14.90		
Empathy	*M*	99.1	99.1	99.2	100.3	102.20	6.92	< .001
	SD	14.6	14.6	14.6	14.6	14.60		
Social Responsibility	*M*	98.2	98.0	99.7	101.1	103.10	16.23	< .001
	SD	14.8	14.8	14.8	14.8	14.80		
Decision Making Composite	*M*	96.2	99.0	101.0	101.9	102.00	21.44	< .001
	SD	14.8	14.8	14.8	14.8	14.80		
Problem Solving	*M*	95.2	98.6	101.8	102.2	102.40	36.17	< .001
	SD	14.6	14.6	14.6	14.6	14.60		
Reality Testing	*M*	98.7	98.6	99.9	100.5	102.40	8.42	< .001
	SD	14.9	14.9	14.9	14.9	14.90		
Impulse Control	*M*	97.5	100.4	100.6	101.5	100.00	8.34	< .001
	SD	15.0	15.0	14.9	14.9	15.00		
Stress Management Composite	*M*	97.2	98.6	100.9	101.1	102.30	15.38	< .001
	SD	14.9	14.9	14.8	14.8	14.80		
Flexibility	*M*	96.9	99.7	101.2	101.3	100.90	11.91	< .001
	SD	15.0	15.0	14.9	14.9	15.00		
Stress Tolerance	*M*	97.6	99.0	101.4	100.5	101.60	10.42	< .001
	SD	14.6	14.6	14.6	14.6	14.60		
Optimism	*M*	98.3	98.0	99.6	101.0	103.20	16.43	< .001
	SD	14.9	14.9	14.9	14.9	14.90		
Happiness	*M*	98.1	98.0	98.9	100.9	104.10	23.61	< .001
	SD	14.9	14.9	14.8	14.9	14.90		

Figure A.1. Histogram of EQ-i 2.0 Total EI Standard Scores in the Normative Sample



This figure illustrates the distribution of EQ-i 2.0 Total EI scores in the normative sample. Distributions that approximate a normal ("bell-shaped") curve, such as those found in the figure to the left, suggest it is unnecessary to apply a normalizing transformation to EQ-i 2.0 scores.

Table A.11. Internal Consistency: EQ-i 2.0 Normative Sample

The following table summarizes the internal consistency (Cronbach's alpha) values for the EQ-i 2.0 Total EI score, composite scales, and subscales in the EQ-i 2.0 normative groups. Alpha values range from 0.00 to 1.00. Higher values, like those found in the EQ-i 2.0 normative sample, provide evidence for strong reliability.

Scale	# of items	EQ-i 2.0 Normative Group										
		General (Total Sample)	Male					Female				
			18–29	30–39	40–49	50–59	60+	18–29	30–39	40–49	50–59	60+
Total EI	**118**	**.97**	.97	.97	.97	.97	.97	.97	.97	.98	.97	.98
Self-Perception Composite	**24**	**.93**	.93	.93	.93	.92	.92	.94	.93	.94	.94	.93
Self-Regard	**8**	**.91**	.92	.91	.9	.89	.86	.92	.91	.92	.92	.90
Self-Actualization	**9**	**.88**	.88	.88	.88	.88	.87	.90	.89	.90	.88	.87
Emotional Self-Awareness	**7**	**.81**	.79	.81	.81	.80	.81	.80	.80	.81	.81	.80
Self-Expression Composite	**23**	**.88**	.88	.88	.88	.87	.86	.88	.88	.88	.88	.89
Emotional Expression	**8**	**.84**	.83	.85	.84	.84	.82	.83	.85	.82	.84	.82
Assertiveness	**7**	**.77**	.76	.75	.75	.77	.77	.78	.77	.79	.78	.79
Independence	**8**	**.81**	.82	.79	.80	.75	.75	.81	.82	.8	.81	.82
Interpersonal Composite	**23**	**.92**	.92	.92	.92	.92	.93	.92	.91	.93	.92	.93
Interpersonal Relationships	**8**	**.86**	.87	.89	.87	.86	.87	.86	.86	.88	.86	.87
Empathy	**9**	**.88**	.86	.88	.87	.88	.88	.87	.85	.88	.86	.86
Social Responsibility	**6**	**.80**	.77	.81	.78	.81	.82	.80	.80	.81	.80	.82
Decision Making Composite	**24**	**.88**	.87	.88	.89	.88	.88	.89	.86	.87	.87	.88
Problem Solving	**8**	**.85**	.83	.85	.86	.85	.85	.85	.84	.84	.82	.85
Reality Testing	**8**	**.81**	.8	.80	.79	.80	.84	.79	.8	.83	.81	.81
Impulse Control	**8**	**.77**	.79	.75	.79	.74	.75	.81	.75	.77	.76	.77
Stress Management Composite	**24**	**.92**	.90	.92	.91	.91	.92	.92	.91	.92	.92	.92
Flexibility	**8**	**.80**	.78	.80	.77	.78	.8	.82	.83	.79	.80	.82
Stress Tolerance	**8**	**.87**	.86	.84	.85	.86	.89	.86	.85	.86	.87	.87
Optimism	**8**	**.89**	.88	.90	.88	.89	.88	.89	.89	.90	.89	.89
Happiness	**8**	**.92**	.91	.91	.91	.92	.90	.90	.91	.92	.93	.92
N	**4,000**	**400**	**400**	**400**	**400**	**400**	**400**	**400**	**400**	**400**	**400**	**400**

Table A.12. Demographic Characteristics of the EQ-i 2.0 Test-Retest Samples

The following table summarizes the demographic characteristics of the EQ-i 2.0 test-retest samples. Ideally, these samples should include representation from a wide range of demographic groups, as found in the EQ-i 2.0 test-retest samples.

Demographic		2–4 Weeks		8 Weeks	
		N	%	*N*	%
Gender	Male	101	49.5	52	49.1
	Female	103	50.5	54	50.9
Race/Ethnicity	Black	29	14.2	3	2.8
	Hispanic/Latino	13	6.4	2	1.9
	White	141	69.1	95	89.6
	Other	21	10.3	6	5.7
Age Group (Years)	18–29	23	11.3	11	10.4
	30–39	47	23.0	9	8.5
	40–49	38	18.6	19	17.9
	50–59	41	20.1	35	33.0
	60+	55	27.0	32	30.2
	M (SD)	47.7 (15.2)		51.4 (13.9)	
	Total	**204**	**100.0**	**106**	**100.0**

Table A.13. EQ-i 2.0 Test-retest Correlations and Descriptive Statistics

The following table summarizes the test-retest correlations and Time 1 and Time 2 means and standard deviations for the EQ-i 2.0 Total EI score, composite scales, and subscales in the 2–4 week and 8-week retest samples. Correlations range from 0.00 to 1.00. Higher values, as found in the EQ-i 2.0 test-retest samples, suggest excellent test-retest reliability.

Scale	2–4 Weeks					8 Weeks				
	Test-retest *r*	Time 1		Time 2		Test-retest *r*	Time 1		Time 2	
		M	*SD*	*M*	*SD*		*M*	*SD*	*M*	*SD*
Total EI	.92	98.3	16.6	98.8	17.4	.81	97.1	14.8	98.1	14.8
Self-Perception Composite	.90	98.6	15.8	98.7	17.2	.80	96.4	16.0	97.3	15.6
Self-Regard	.88	98.7	15.9	99.4	16.9	.84	98.1	15.3	98.3	15.8
Self-Actualization	.88	98.6	15.8	98.5	16.8	.74	94.4	15.6	95.8	14.8
Emotional Self-Awareness	.82	99.3	15.4	98.7	16.8	.72	98.7	15.3	99.5	15.0
Self-Expression Composite	.86	99.3	15.7	99.5	15.9	.80	98.9	14.7	98.7	14.4
Emotional Expression	.81	98.1	15.9	98.9	16.2	.74	100.7	15.0	100.5	13.6
Assertiveness	.80	99.9	14.8	100.1	14.7	.75	97.3	14.9	97.5	14.0
Independence	.85	100.6	15.5	100.0	16.0	.81	99.0	14.0	98.4	15.1
Interpersonal Composite	.91	98.1	16.4	98.1	16.1	.76	97.2	15.6	98.3	14.7
Interpersonal Relationships	.88	98.9	16.1	98.9	15.5	.77	97.7	16.5	98.7	15.4
Empathy	.89	98.4	16.3	98.4	16.2	.72	99.3	15.6	99.9	14.8
Social Responsibility	.86	97.7	16.3	97.8	15.9	.77	95.2	15.1	96.6	14.5
Decision Making Composite	.88	98.7	15.7	99.7	17.1	.83	98.2	14.5	99.7	14.7
Problem Solving	.82	98.9	15.9	100.4	16.5	.73	98.6	14.9	100.5	14.0
Reality Testing	.84	98.7	15.9	98.6	16.3	.75	97.6	15.2	99.3	15.7
Impulse Control	.78	99.2	15.2	100.1	16.4	.81	99.4	15.4	99.3	14.9
Stress Management Composite	.90	98.0	17.2	98.8	17.2	.78	97.2	14.2	98.2	14.3
Flexibility	.85	97.8	15.4	99.1	16.6	.70	99.5	14.7	99.8	14.6
Stress Tolerance	.85	98.9	16.0	99.0	15.7	.75	96.7	13.7	97.4	13.5
Optimism	.88	98.2	17.2	98.9	17.0	.80	97.0	15.2	98.5	15.7
Happiness	.88	99.3	15.9	99.3	16.8	.84	97.6	17.6	98.3	16.9

Note. 2- to 4-week test-retest *N* = 204, time interval mean = 18.4 days (*SD* = 3.2 days), range = 14–28 days. 8-week test-retest *N* = 104, time interval mean = 56.8 days (*SD* = 1.3 days), range = 54–59 days

Table A.14. Differences between Time 1 and Time 2 EQ-i 2.0 Standard Scores: 2–4-Week Interval

The following table summarizes the differences between Time 1 and Time 2 scores for the EQ-i 2.0 Total EI score, composite scales, and subscales for the 2–4-week test-retest sample. The first set of results (% of Respondents) lists the percentage of respondents whose scores decreased by more than 15 points, changed by 15 points or less, or increased by more than 15 points over time. Test-retest stability is supported if the majority of respondents show changes of 15 points or less over time, as found in the EQ-i 2.0 2-4 week test-retest sample. The mean and standard deviation of these differences across participants is also provided, along with the 95% confidence interval (CI), which illustrates whether the difference is statistically meaningful for the sample as a whole. That is, if the CI includes zero between the lower bound (LB) and upper bound (UB), the difference is not statistically meaningful, as found for most EQ-i 2.0 scales and subscales.

	% of Respondents					95% CI	
Scale	Scores Decreased More Than 1 *SD* (15 points)	Scores Changed by 1 *SD* or Less (15 points)	Scores Increased More Than 1 *SD* (15 points)	*M* Diff	*SD*	LB	UB
Total EI	1.5	97.0	1.5	0.5	6.9	0.1	0.9
Self-Perception Composite	1.5	96.5	2.0	0.1	7.4	-0.6	0.8
Self-Regard	1.5	94.5	4.0	0.7	8.0	-0.1	1.5
Self-Actualization	4.0	93.0	3.0	-0.7	8.8	-1.5	0.2
Emotional Self-Awareness	8.5	91.0	3.5	-0.6	9.8	-1.6	0.3
Self-Expression Composite	2.0	95.0	3.0	0.2	8.4	-0.6	1.0
Emotional Expression	4.0	90.0	6.0	0.9	10.0	-0.1	1.9
Assertiveness	4.0	91.5	4.5	0.0	8.1	-0.8	0.8
Independence	4.5	93.5	2.0	0.2	9.3	-0.7	1.1
Interpersonal Composite	2.5	95.5	2.0	0.0	7.1	-0.7	0.7
Interpersonal Relationships	2.5	94.0	3.5	0.0	7.8	-0.8	0.7
Empathy	3.5	93.5	3.0	0.0	7.6	-0.8	0.7
Social Responsibility	3.0	94.5	2.5	0.2	8.5	-0.7	1.0
Decision Making Composite	2.5	92.5	5.0	1.0	8.2	0.2	1.8
Problem Solving	2.5	92.0	5.5	1.6	9.6	0.6	2.5
Reality Testing	4.5	92.5	3.0	-0.1	9.1	-1.0	0.8
Impulse Control	9.5	83.0	7.5	0.8	10.4	-0.2	1.9
Stress Management Composite	2.5	94.0	3.5	0.8	7.8	0.1	1.6
Flexibility	2.0	94.5	3.5	1.3	8.8	0.5	2.2
Stress Tolerance	4.5	91.5	4.0	0.1	8.8	-0.8	1.0
Optimism	4.0	91.5	4.5	0.7	8.3	-0.1	1.5
Happiness	3.0	95.0	2.0	-0.1	8.1	-0.9	0.7

Note. *N* = 204. *M* Diff = mean difference; CI = confidence interval; LB = lower bound, UB = upper bound.

Table A.15. Differences between Time 1 and Time 2 EQ-i 2.0 Standard Scores: 8-Week Interval

The following table summarizes the differences between Time 1 and Time 2 scores for the EQ-i 2.0 Total EI score, composite scales, and subscales for the 8-week test-retest sample. The first set of results (% of Respondents) lists the percentage of respondents whose scores decreased by more than 15 points, changed by 15 points or less, or increased by more than 15 points over time. Test-retest stability is supported if the majority of respondents show changes of 15 points or less over time, as found in the EQ-i 2.0 8-week test-retest sample. The mean and standard deviation of these differences across participants is also provided, along with the 95% confidence interval (CI), which illustrates whether the difference is statistically meaningful for the sample as a whole. That is, if the CI includes zero between the lower bound (LB) and upper bound (UB), the difference is not statistically meaningful, as found for most EQ-i 2.0 scales and subscales.

	% of Respondents					95% CI	
Scale	Scores Decreased More Than 1 *SD* (15 points)	Scores Changed by 1 *SD* or Less (15 points)	Scores Increased More Than 1 *SD* (15 points)	*M* Diff	*SD*	LB	UB
Total EI	2.9	93.2	3.8	1.0	9.1	0.6	1.4
Self-Perception Composite	4.8	91.4	3.8	1.0	10.0	0.0	2.0
Self-Regard	5.8	91.4	2.9	0.3	8.9	-0.5	1.2
Self-Actualization	4.8	88.5	6.7	-0.5	9.0	-1.4	0.4
Emotional Self-Awareness	6.7	84.6	8.7	1.0	11.5	-0.2	2.1
Self-Expression Composite	3.8	91.3	4.8	-0.3	9.2	-1.2	0.7
Emotional Expression	6.7	86.5	6.7	-0.2	10.5	-1.2	0.9
Assertiveness	3.8	89.4	6.7	1.3	11.0	0.2	2.3
Independence	4.8	92.3	2.9	0.1	10.4	-0.9	1.1
Interpersonal Composite	3.8	90.4	5.8	1.1	10.5	0.0	2.1
Interpersonal Relationships	3.8	90.4	5.8	1.0	10.8	-0.1	2.1
Empathy	3.8	91.3	4.8	0.5	11.4	-0.6	1.6
Social Responsibility	3.8	89.4	6.7	1.3	10.0	0.3	2.3
Decision Making Composite	1.9	91.3	6.7	1.3	8.6	0.4	2.1
Problem Solving	5.8	84.6	9.6	1.9	10.8	0.9	3.0
Reality Testing	4.8	84.6	10.6	1.6	11.0	0.5	2.7
Impulse Control	8.7	86.6	4.8	-0.5	9.3	-1.4	0.4
Stress Management Composite	3.8	92.3	3.8	1.1	9.4	0.2	2.0
Flexibility	3.8	91.4	4.8	0.5	11.3	-0.7	1.6
Stress Tolerance	1.9	91.3	6.7	0.7	8.9	-0.2	1.6
Optimism	3.8	88.5	7.7	1.5	9.9	0.5	2.4
Happiness	3.8	92.3	3.8	0.8	9.8	-0.2	1.8

Note. *N* = 104. *M* Diff = mean difference; CI = confidence interval; LB = lower bound, UB = upper bound.

Table A.16. Demographic Distributions of EQ-i 2.0 Exploratory and Confirmatory Normative Subsamples

The following table summarizes the demographic characteristics of the subsamples of the EQ-i 2.0 normative sample, created for performing exploratory factor analysis and confirmatory factor analysis. Ideally, the two samples should show similar demographic characteristics, as found in the EQ-i 2.0 exploratory and confirmatory samples.

Demographic			Exploratory Sample		Confirmatory Sample	
			N	%	*N*	%
Gender	Male		1,000	50.0	1,000	50.0
	Female		1,000	50.0	1,000	50.0
Age Group (Years)	18–29		400	20.0	400	20.0
	30–39		400	20.0	400	20.0
	40–49		400	20.0	400	20.0
	50–59		400	20.0	400	20.0
	60+		400	20.0	400	20.0
	M (SD)		44.6 (15.0)		44.7 (15.2)	
Race/Ethnicity	Black		209	10.5	210	10.5
	Hispanic/Latino		216	10.8	217	10.9
	White		1,417	70.9	1,417	70.9
	Other		158	7.9	156	7.8
Education Level	High School or Less		877	43.9	874	43.7
	Some College/University		558	27.9	561	28.1
	College/University or Higher		565	28.3	565	28.3
Geographic Region	U.S.	Northeast	314	15.7	341	17.1
		Midwest	409	20.5	384	19.2
		South	650	32.5	642	32.1
		West	428	21.4	432	21.6
	Canada	West	22	1.1	32	1.6
		Prairies	38	1.9	34	1.7
		Central	124	6.2	120	6.0
		East	15	0.8	15	0.8
Total			**2,000**	**100.0**	**2,000**	**100.0**

Table A.17. Confirmatory Factor Analysis Results for EQ-i 2.0

The following table provides the fit statistics generated by the confirmatory factor analyses of the EQ-i 2.0. Values below .100 for the RMSEA and above .900 for all other fit statistics, which were found in the majority of the EQ-i 2.0 models, suggest the factor structure that emerged from the exploratory factor analyses was independently replicated in the confirmatory factor analysis.

		Composites				
Fit Index	Overall Model	Self-Perception	Self-Expression	Interpersonal	Decision Making	Stress Management
GFI	.955	.963	.960	.942	.979	.943
AGFI	.864	.932	.931	.900	.966	.912
NFI	.966	.969	.945	.940	.970	.943
NNFI	.934	.956	.929	.920	.966	.931
CFI	.967	.971	.949	.943	.975	.947
RMSEA	.152	.081	.078	.096	.049	.082

Note. N = 2,000. GFI = Goodness of Fit Index (Jöreskog & Sörbom, 1986), AGFI = Adjusted Goodness of Fit Index (Jöreskog & Sörbom, 1986), NFI = Normed Fit Index (Bentler & Bonett, 1980), NNFI = Non-Normed Fit Index (Bentler & Bonett, 1980), CFI = Comparative Fit Index (Bentler, 1990), RMSEA = Root Mean Square Error of Approximation (Steiger & Lind, 1980).

Table A.18. Correlations among EQ-i 2.0 Composite Scales

The following table illustrates the correlations among the EQ-i 2.0 composite scales in the EQ-i 2.0 normative sample. Correlations range from 0.00 to 1.00, with higher values suggesting the scales share a relevant common psychological characteristic (i.e., emotional intelligence). Very high values (e.g., > .90) would suggest a unidimensional factor structure. Moderately sized correlations, like those that were found in the EQ-i 2.0, support both the concept that the scales measure a common psychological characteristic, as well as the multidimensional factor structure of the EQ-i 2.0.

Composite Scale	SP	SE	IS	DM	SM
SP. Self-Perception Composite	–				
SE. Self-Expression Composite	.73	–			
IS. Interpersonal Composite	.71	.55	–		
DM. Decision Making Composite	.70	.66	.50	–	
SM. Stress Management Composite	.78	.67	.63	.73	–

Note. N = 4,000. All correlations significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.19. Correlations among EQ-i 2.0 Subscales

The following table illustrates the correlations among the EQ-i 2.0 subscales in the EQ-i 2.0 normative sample. Correlations range from 0.00 to 1.00, with higher values suggesting the scales share a relevant common psychological characteristic. Shaded cells portray correlations of subscales within their respective composite scales. Moderate correlations were found within the composite scales supporting both the concept that the scales measure a common psychological characteristic, as well as the multidimensional factor structure.

	Self-Perception			Self-Expression Interpersonal						Decision Making			Stress Management			HA
Subscale	SR	SA	ES	EE	AS	IN	IR	EM	RE	PS	RT	IC	FL	ST	OP	
SR. Self-Regard	–															
SA. Self-Actualization	.70	–														
ES. Emotional Self-Awareness	.43	.55	–													
EE. Emotional Expression	.51	.47	.46	–												
AS. Assertiveness	.52	.57	.45	.43	–											
IN. Independence	.56	.47	.24	.33	.47	–										
IR. Interpersonal Relationships	.56	.62	.52	.59	.46	.31	–									
EM. Empathy	.29	.45	.64	.42	.3	.10	.61	–								
RE. Social Responsibility	.47	.67	.47	.42	.41	.27	.61	.55	–							
PS. Problem Solving	.60	.54	.32	.42	.45	.73	.38	.20	.34	–						
RT. Reality Testing	.55	.69	.76	.4	.55	.40	.55	.58	.53	.48	–					
IC. Impulse Control	.30	.24	.20	.18	.12	.41	.15	.19	.19	.51	.27	–				
FL. Flexibility	.47	.44	.26	.48	.26	.50	.43	.27	.37	.60	.32	.39	–			
ST. Stress Tolerance	.59	.65	.42	.34	.49	.56	.46	.32	.46	.67	.61	.33	.50	–		
OP. Optimism	.73	.69	.48	.47	.39	.36	.61	.48	.57	.49	.56	.26	.48	.58	–	
HA. Happiness	.81	.68	.43	.53	.40	.40	.60	.38	.52	.49	.52	.24	.47	.51	.81	–

Note. N = 4,000. All correlations significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.20. Demographic Characteristics of EQ-i 2.0 Validity Samples

The following table summarizes the demographic characteristics of the samples used in the EQ-i 2.0 validity analyses. Ideally, these samples should include representation from a wide range of demographic groups, as found in the EQ-i 2.0 validity samples.

		EQ-i 1.0		SSI		NEO-FFI		MSCEIT		Watson-Glaser II	
Demographic		*N*	%	*N*	%	*N*	%	*N*	%	*N*	%
Gender	Male	50	49.5	50	49.5	50	50.0	50	46.7	51	50.0
	Female	51	50.5	51	50.5	50	50.0	57	53.3	51	50.0
Age Group (Years)	18–29	2	2.0	3	3.0	1	1.0	6	5.6	6	5.9
	30–39	18	17.8	25	24.8	23	23.0	15	14.0	10	9.8
	40–49	29	28.7	27	26.7	36	36.0	24	22.4	20	19.6
	50–59	24	23.8	17	16.8	25	25.0	20	18.7	28	27.5
	60+	28	27.7	29	28.7	15	15.0	42	39.3	38	37.3
	M (SD)	50.6 (12.8)		49.7 (13.6)		47.5 (11.1)		52.8 (14.1)		52.8 (13.5)	
Race/Ethnicity	Black	22	21.8	21	20.8	25	25.0	7	6.5	10	9.8
	Hispanic/Latino	44	43.6	37	36.6	54	54.0	8	7.5	9	8.8
	White	29	28.7	38	37.6	14	14.0	87	81.3	77	75.5
	Other	6	5.9	5	5.0	7	7.0	5	4.7	6	5.9
Education Level	High School or Less	7	6.9	15	14.9	25	25.0	27	25.2	72	70.6
	Some College/University	43	42.6	42	41.6	47	47.0	30	28.0	19	18.6
	College/University or Higher	51	50.5	44	43.6	28	28.0	50	46.7	11	10.8
U.S. Geographic Region	Northeast	16	15.8	14	13.9	10	10.0	22	20.6	24	23.5
	Midwest	3	3.0	15	14.9	6	6.0	16	15.0	21	20.6
	South	42	41.6	38	37.6	37	37.0	48	44.9	37	36.3
	West	40	39.6	34	33.7	47	47.0	21	19.6	20	19.6
Total		**101**	**100.0**	**101**	**100.0**	**100**	**100.0**	**107**	**100.0**	**102**	**100.0**

Note. SSI = Social Skills Inventory (Riggio & Carney, 2003); NEO-FFI = NEO Five Factor Inventory (Costa & McCrae, 1992); MSCEIT = Mayer-Salovey-Caruso Emotional Intelligence Test (Mayer et al., 2002).

Table A.21. Correlations between EQ-i 2.0 and EQ-i

The following table illustrates correlations between the EQ-i scales and their corresponding EQ-i 2.0 Total EI Score, composite scales, and subscales. Values range from -1.00 to +1.00; values close to -1.00 represent an inverse relationship between scores on the two scales, values close to +1.00 represent a direct relationship, and values close to zero represent a lack of a relationship. Shaded cells indicate constructs that were relatively unchanged from the EQ-i to the EQ-i 2.0. Unshaded cells indicate constructs that changed substantially from the EQ-i to the EQ-i 2.0. The high positive correlations found between the EQ-i and EQ-i 2.0 support the validity of the EQ-i 2.0.

Scale		*r*	EQ-i		EQ-i 2.0	
			M	*SD*	*M*	*SD*
Total EI		.90	102.3	14.5	104.6	14.3
Self-Perception Composite	Self-Regard	.88	101.4	14.4	104.1	13.1
	Self-Actualization	.71	100.4	13.0	105.1	13.6
	Emotional Self-Awareness*	.50	103.1	14.5	103.7	15.1
Self-Expression Composite	Emotional Expression*	.84	N/A	N/A	102.6	16.5
	Assertiveness	.65	101.4	12.7	103.9	13.5
	Independence	.81	104.8	13.9	104.5	13.6
Interpersonal Composite	Interpersonal Relationships	.86	99.8	16.2	101.9	14.2
	Empathy	.78	96.1	14.1	101.5	15.4
	Social Responsibility	.49	100.3	13.7	104.3	14.6
Decision Making Composite	Problem Solving	.57	100.7	13.5	103.7	14.3
	Reality Testing	.49	104.7	13.1	103.1	15.2
	Impulse Control	.54	105.6	12.6	100.9	14.0
Stress Management Composite	Flexibility	.67	102.3	15.4	102.0	13.8
	Stress Tolerance	.79	103.7	14.7	103.8	14.9
	Optimism	.69	98.6	14.6	103.1	13.5
Happiness		.84	102.1	14.4	102.8	13.3

Note. $N = 101$. All correlations are significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large. N/A = not applicable.
*represents correlations with Emotional Self-Awareness on the original EQ-i.

Table A.22.a Correlations between the EQ-i 2.0 and the Social Skills Inventory

The following table illustrates correlations between the EQ-i 2.0 Total EI score, composite scales, and subscales, and the Social Skills Inventory (SSI). Values range from -1.00 to +1.00; values close to -1.00 represent an inverse relationship between scores on the two scales, values close to +1.00 represent a direct relationship, and values close to zero represent a lack of a relationship. The positive correlations found between most of the SSI scales (see chapter 13) and the EQ-i 2.0 support the validity of the EQ-i 2.0.

	SSI Scale					
EQ-i 2.0 Scale	Total Score	Total Emotional	Total Social	Total Control	Total Expressivity	Total Sensitivity
Total EI	.54	.54	.47	.63	.47	.08
Self-Perception Composite	.53	.51	.47	.54	.48	.12
Self-Regard	.42	.44	.35	.52	.43	-.06
Self-Actualization	.51	.46	.49	.45	.47	.19
Emotional Self-Awareness	.37	.36	.33	.35	.26	.21
Self-Expression Composite	.47	.47	.41	.53	.46	.03
Emotional Expression	.45	.41	.43	.34	.39	.26
Assertiveness	.24	.24	.21	.35	.24	-.08
Independence	.36	.41	.28	.52	.39	-.13
Interpersonal Composite	.64	.55	.63	.50	.57	.32
Interpersonal Relationships	.66	.57	.63	.54	.62	.25
Empathy	.52	.46	.5	.39	.38	.39
Social Responsibility	.46	.35	.48	.35	.46	.17
Decision Making Composite	.22	.29	.14	.49	.13	-.11
Problem Solving	.29	.39	.17	.55	.23	-.14
Reality Testing	.39	.40	.34	.46	.28	.13
Impulse Control	-.13	-.08	-.15	.15	-.19	-.22
Stress Management Composite	.41	.46	.32	.59	.35	-.03
Flexibility	.37	.40	.29	.50	.33	-.02
Stress Tolerance	.26	.33	.18	.54	.14	-.08
Optimism	.37	.39	.30	.38	.38	.02
Happiness	.37	.39	.31	.41	.41	-.02

Note. $N = 101$. SSI = Social Skills Inventory (Riggio & Carney, 2003). Correlations of .19 and above are significant at $p < .05$, correlations of .25 and above are significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.22.b Correlations between the EQ-i 2.0 and the Social Skills Inventory

EQ-i 2.0 Scale	SSI Scale					
	Emotional Expressivity	Emotional Sensitivity	Emotional Control	Social Expressivity	Social Sensitivity	Social Control
Total EI	.28	.46	.28	.53	-.35	.65
Self-Perception Composite	.33	.43	.19	.50	-.26	.60
Self-Regard	.27	.29	.28	.47	-.39	.51
Self-Actualization	.34	.44	.06	.48	-.16	.57
Emotional Self-Awareness	.19	.36	.12	.27	-.03	.40
Self-Expression Composite	.35	.41	.12	.45	-.38	.63
Emotional Expression	.33	.41	.00	.37	-.01	.46
Assertiveness	.14	.25	.06	.27	-.38	.44
Independence	.30	.27	.21	.39	-.50	.55
Interpersonal Composite	.34	.53	.15	.63	-.03	.58
Interpersonal Relationships	.36	.52	.19	.69	-.14	.60
Empathy	.22	.49	.14	.42	.11	.43
Social Responsibility	.28	.33	.03	.50	-.07	.46
Decision Making Composite	-.01	.23	.35	.20	-.43	.41
Problem Solving	.12	.27	.36	.26	-.52	.49
Reality Testing	.16	.37	.21	.32	-.18	.47
Impulse Control	-.28	-.09	.22	-.10	-.26	.03
Stress Management Composite	.16	.35	.37	.42	-.42	.52
Flexibility	.16	.30	.31	.39	-.35	.45
Stress Tolerance	.01	.22	.41	.20	-.37	.44
Optimism	.22	.32	.20	.42	-.30	.38
Happiness	.27	.24	.23	.43	-.28	.38

Note. $N = 101$. SSI = Social Skills Inventory (Riggio & Carney, 2003). Correlations of .19 and above are significant at $p < .05$, correlations of .25 and above are significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.23. Correlations between EQ-i 2.0 and NEO Five Factor Inventory

The following table illustrates correlations between the EQ-i 2.0 Total EI score, composite scales, and subscales, and the NEO Five Factor Inventory (NEO-FFI). Values range from -1.00 to +1.00; values close to -1.00 represent an inverse relationship between scores on the two scales, values close to +1.00 represent a direct relationship, and values close to zero represent a lack of a relationship. The positive correlations found between most of the NEO-FFI scales (see chapter 13) and the EQ-i 2.0 support the validity of the EQ-i 2.0.

	NEO-FFI Scale				
EQ-i 2.0 Scale	Neuroticism	Extraversion	Openness to Experience	Agreeableness	Conscientiousness
Total EI	-.71	.57	.10	.36	.61
Self-Perception Composite	-.65	.61	.17	.27	.63
Self-Regard	-.68	.57	.04	.21	.46
Self-Actualization	-.53	.54	.18	.18	.63
Emotional Self-Awareness	-.39	.38	.22	.32	.50
Self-Expression Composite	-.57	.45	.14	.15	.46
Emotional Expression	-.39	.45	.19	.29	.32
Assertiveness	-.43	.33	.02	-.09	.44
Independence	-.55	.26	.09	.09	.35
Interpersonal Composite	-.49	.54	.04	.51	.51
Interpersonal Relationships	-.51	.54	-.12	.50	.45
Empathy	-.29	.38	.08	.47	.42
Social Responsibility	-.49	.46	.16	.30	.43
Decision Making Composite	-.64	.29	-.03	.29	.53
Problem Solving	-.50	.21	.02	.14	.36
Reality Testing	-.58	.48	.11	.27	.59
Impulse Control	-.35	-.03	-.20	.25	.25
Stress Management Composite	-.71	.53	.1	.30	.48
Flexibility	-.56	.38	.09	.23	.41
Stress Tolerance	-.58	.38	.07	.17	.41
Optimism	-.61	.56	.10	.34	.38
Happiness	-.64	.49	.05	.13	.44

Note. $N = 100$. NEO-FFI = NEO Five Factor Inventory (Costa & McCrae, 1992). Correlations of .19 and above are significant at $p < .05$, correlations of .25 and above are significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.24. Correlations between EQ-i 2.0 and Mayer-Salovey-Caruso Emotional Intelligence Test - Expert Consensus Scores: Total, Area, and Branch Scores

The following table illustrates correlations between the EQ-i 2.0 Total EI score, composite scales, and subscales, and the Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT; Total, Area, and Branch Scores). Values range from -1.00 to +1.00; values close to -1.00 represent an inverse relationship between scores on the two scales, values close to +1.00 represent a direct relationship, and values close to zero represent a lack of a relationship. The correlations close to zero found between most of the MSCEIT scores (see chapter 13) and the EQ-i 2.0 support the validity of the EQ-i 2.0.

	MSCEIT Scale						
		Area Scores		Branch Scores			
				Experiential		Strategic	
EQ-i 2.0 Scale	Total EIQ	Experiential	Strategic	Perceiving Emotions	Facilitating Thought	Understanding Emotions	Managing Emotions
Total EI	.12	.15	.04	.12	.15	-.04	.17
Self-Perception Composite	.06	.11	.00	.06	.16	-.07	.10
Self-Regard	-.01	.07	-.11	.06	.06	-.17	.02
Self-Actualization	.03	.06	-.02	.03	.12	-.10	.12
Emotional Self-Awareness	.21	.19	.20	.08	.31	.16	.16
Self-Expression Composite	.05	.07	.02	.05	.04	-.05	.13
Emotional Expression	.13	.14	.09	.07	.19	.01	.18
Assertiveness	-.06	-.03	-.06	-.02	-.07	-.08	-.01
Independence	.02	.04	.01	.05	-.05	-.05	.12
Interpersonal Composite	.07	.08	.01	.03	.15	-.05	.12
Interpersonal Relationships	-.09	-.02	-.17	-.04	.03	-.23	.01
Empathy	.14	.11	.14	.05	.20	.07	.19
Social Responsibility	.17	.14	.12	.10	.20	.08	.14
Decision Making Composite	.27	.27	.16	.27	.18	.09	.24
Problem Solving	.16	.15	.11	.17	.00	.03	.24
Reality Testing	.19	.23	.07	.19	.25	.06	.08
Impulse Control	.23	.22	.16	.24	.14	.10	.20
Stress Management Composite	.09	.12	.01	.11	.09	-.05	.14
Flexibility	.04	.02	.05	.02	-.06	.02	.10
Stress Tolerance	.09	.11	.04	.09	.12	.02	.09
Optimism	.08	.14	-.04	.13	.12	-.14	.14
Happiness	.11	.16	.01	.17	.09	-.08	.16

Note. $N = 107$. MSCEIT = Mayer-Salovey-Caruso Emotional Intelligence Test (Mayer et al., 2002). Correlations of .19 and above significant at $p < .05$, correlations of .25 and above significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.25. Correlations between EQ-i 2.0 and Mayer-Salovey-Caruso Emotional Intelligence Test - Expert Consensus Scores: Task Scores

The following table illustrates correlations between the EQ-i 2.0 Total EI score, composite scales, and subscales, and the Mayer-Salovey-Caruso Emotional Intelligence Test (MSCEIT; Task Scores). Values range from -1.00 to +1.00; values close to -1.00 represent an inverse relationship between scores on the two scales, values close to +1.00 represent a direct relationship, and values close to zero represent a lack of a relationship. The correlations close to zero found between most of the MSCEIT scores (see chapter 13) and the EQ-i 2.0 support the validity of the EQ-i 2.0.

	MSCEIT Task Score							
	Experiential				Strategic			
	Perceiving Emotions		Facilitating Thought		Understanding Emotions		Managing Emotions	
EQ-i 2.0 Scale	Faces	Pictures	Sensation	Facilitation	Changes	Blends	Emotional Management	Emotional Relations
Total EI	.17	-.03	.18	.10	-.10	.00	.09	.16
Self-Perception Composite	.10	-.04	.15	.13	-.11	-.04	.02	.11
Self-Regard	.10	-.03	.05	.08	-.2	-.11	-.04	.02
Self-Actualization	.07	-.06	.12	.08	-.09	-.10	.03	.14
Emotional Self-Awareness	.10	.00	.27	.24	.05	.19	.10	.15
Self-Expression Composite	.12	-.10	.09	.04	-.12	.01	.03	.14
Emotional Expression	.17	-.11	.17	.16	-.11	.07	.12	.16
Assertiveness	.01	-.06	.03	-.10	-.10	-.05	-.06	-.01
Independence	.08	-.05	-.02	.00	-.07	-.01	-.01	.16
Interpersonal Composite	.12	-.13	.18	.05	-.13	-.01	.14	.07
Interpersonal Relationships	.05	-.16	.03	.02	-.26	-.17	.02	-.02
Empathy	.12	-.10	.25	.04	-.04	.11	.24	.12
Social Responsibility	.17	-.05	.23	.07	.02	.08	.12	.11
Decision Making Composite	.29	.11	.22	.14	.03	.10	.15	.24
Problem Solving	.22	.00	.04	.06	.03	.03	.14	.22
Reality Testing	.17	.11	.26	.17	.00	.08	.02	.11
Impulse Control	.24	.13	.19	.07	.03	.11	.16	.18
Stress Management Composite	.11	.04	.13	.07	-.08	-.02	.07	.15
Flexibility	.05	.01	-.02	.00	-.06	.05	.02	.14
Stress Tolerance	.05	.09	.18	.05	.06	-.01	.04	.11
Optimism	.15	.01	.13	.10	-.18	-.07	.09	.12
Happiness	.20	.03	.12	.04	-.11	-.07	.08	.14

Note. $N = 107$. MSCEIT = Mayer-Salovey-Caruso Emotional Intelligence Test (Mayer et al., 2002). Correlations of .19 and above significant at $p < .05$, correlations of .25 and above significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.26. Correlations between EQ-i 2.0 and Watson-Glaser II Critical Thinking Appraisal

The following table illustrates correlations between the EQ-i 2.0 Total EI score, composite scales, and subscales, and the Watson-Glaser II Critical Thinking Appraisal. Values range from -1.00 to +1.00; values close to -1.00 represent an inverse relationship between scores on the two scales, values close to +1.00 represent a direct relationship, and values close to zero represent a lack of a relationship. For most Watson-Glaser II scales (see chapter 13), the correlations close to zero found between most of the Watson-Glaser II scales (see chapter 13) and the EQ-i 2.0 support the validity of the EQ-i 2.0.

	Watson-Glaser II Critical Thinking Appraisal Scale			
EQ-i 2.0 Scale	Total	Recognize Assumptions	Evaluate Arguments	Draw Conclusions
Total EI	-.05	.03	-.25	.02
Self-Perception Composite	-.10	.02	-.23	-.06
Self-Regard	-.06	.10	-.16	-.11
Self-Actualization	-.07	.00	-.20	-.01
Emotional Self-Awareness	-.14	-.09	-.24	-.04
Self-Expression Composite	-.02	.06	-.17	-.01
Emotional Expression	-.07	-.03	-.12	-.02
Assertiveness	-.07	.03	-.18	-.06
Independence	.09	.15	-.10	.06
Interpersonal Composite	-.13	-.08	-.25	-.01
Interpersonal Relationships	-.12	-.04	-.22	-.06
Empathy	-.09	-.05	-.23	.02
Social Responsibility	-.10	-.12	-.16	.04
Decision Making Composite	.03	.08	-.17	.08
Problem Solving	.10	.16	-.19	.13
Reality Testing	-.05	.00	-.26	.06
Impulse Control	.04	.04	.03	.01
Stress Management Composite	.03	.07	-.23	.11
Flexibility	-.04	.02	-.25	.05
Stress Tolerance	.15	.14	-.13	.22
Optimism	-.06	.01	-.19	-.01
Happiness	-.05	.04	-.13	-.05

Note. $N = 102$. Correlations of .19 and above are significant at $p < .05$, correlations of .25 and above are significant at $p < .01$. Guidelines for evaluating r are .10 = small, .30 = medium, .50 = large.

Table A.27. Demographic Characteristics of Corporate Leaders Sample

The following table summarizes the demographic characteristics of the corporate leaders sample. Ideally, this sample should include leaders representing a wide range of demographic groups, as found in our corporate leaders sample.

Demographic		*N*	%
Gender	Male	143	64.7
	Female	78	35.3
Age Group (Years)	18–29	16	7.2
	30–39	48	21.7
	40–49	61	27.6
	50–59	66	29.9
	60+	30	13.6
	M (SD)	46.8 (11.4)	
Race/Ethnicity	Black	11	5.0
	Hispanic/Latino	8	3.6
	White	175	79.2
	Other	26	11.8
	Missing	1	0.5
Education Level	High School or Less	4	1.8
	Some College/University	27	12.2
	College/University or Higher	189	85.5
	Missing	1	0.5
Occupational Position	CEO	64	29.0
	Other C-level (CFO, COO, etc.)	18	8.1
	Senior Executive	33	14.9
	Director	44	19.9
	Manager	44	19.9
	Other	16	7.2
	Missing	2	0.9
	Total	**221**	**100.0**

Table A.28. EQ-i 2.0 Scores in Corporate Leaders

The following table displays the means and standard deviations of the EQ-i 2.0 Total EI score, composite scales, and subscales in the corporate leaders sample used in validity analyses of the EQ-i 2.0. *d* values provide an effect size to describe the difference between leaders' scores and those in the normative sample ($M = 100$, $SD = 15$) as small, medium, or large. The meaningfully higher scores (i.e., $d \geq .20$) found in leaders relative to the normative sample, supports the validity of the EQ-i 2.0.

Scale		Corporate Leaders	Cohen's *d* (Relative to Norms)
Total EI	*M*	112.2	0.82
	SD	11.7	
Self-Perception Composite	*M*	111.4	0.77
	SD	11.4	
Self-Regard	*M*	108.3	0.56
	SD	10.8	
Self-Actualization	*M*	113.1	0.88
	SD	10.4	
Emotional Self-Awareness	*M*	107.0	0.47
	SD	14.7	
Self-Expression Composite	*M*	110.8	0.73
	SD	11.4	
Emotional Expression	*M*	107.5	0.50
	SD	12.9	
Assertiveness	*M*	109.5	0.64
	SD	12.0	
Independence	*M*	108.4	0.57
	SD	11.6	
Interpersonal Composite	*M*	109.2	0.62
	SD	11.8	
Interpersonal Relationships	*M*	108.3	0.56
	SD	10.9	
Empathy	*M*	106.2	0.41
	SD	13.6	
Social Responsibility	*M*	109.6	0.64
	SD	12.4	
Decision Making Composite	*M*	109.6	0.64
	SD	13.0	
Problem Solving	*M*	109.3	0.63
	SD	12.4	
Reality Testing	*M*	109.0	0.60
	SD	12.4	
Impulse Control	*M*	104.2	0.28
	SD	14.0	
Stress Management Composite	*M*	111.1	0.75
	SD	12.7	
Flexibility	*M*	107.4	0.49
	SD	13.4	
Stress Tolerance	*M*	110.5	0.70
	SD	13.2	
Optimism	*M*	109.5	0.64
	SD	11.5	
Happiness	*M*	106.9	0.46
	SD	11.1	

Note. Positive Cohen's *d* values represent higher mean scores in corporate leaders. Guidelines for evaluating $|d|$ are .20 = small, .50 = medium, .80 = large.

Table A.29. Education Level Effects on EQ-i 2.0 Scores in the Normative Sample

The following table displays the means and standard deviations of EQ-i 2.0 Total EI scores, composite scales, and subscales in normative participants with a high school education or less and those with a post-secondary college/university degree. *d* values provide an effect size for describing differences between the two groups as small, medium, or large. The meaningfully higher scores (i.e., $d \geq .20$) found in post-secondary graduates relative to individuals with a high school education or less supports the validity of the EQ-i 2.0.

Scale		High School or Less	Post-secondary Graduate	Cohen's *d*
Total EI	*M*	98.1	103.2	0.33
	SD	15.5	14.8	
Self-Perception Composite	*M*	98.0	103.8	0.38
	SD	15.5	14.8	
Self-Regard	*M*	98.4	102.4	0.26
	SD	15.4	14.7	
Self-Actualization	*M*	97.5	105.7	0.54
	SD	15.5	14.8	
Emotional Self-Awareness	*M*	99.5	101.2	0.11
	SD	15.7	15.0	
Self-Expression Composite	*M*	99.0	100.4	0.09
	SD	15.7	15.0	
Emotional Expression	*M*	99.1	99.6	0.03
	SD	15.6	14.9	
Assertiveness	*M*	99.5	100.3	0.06
	SD	15.7	15.0	
Independence	*M*	99.3	101.2	0.12
	SD	15.4	14.7	
Interpersonal Composite	*M*	98.7	102.2	0.23
	SD	15.5	14.8	
Interpersonal Relationships	*M*	99.8	99.1	-0.05
	SD	15.7	15.0	
Empathy	*M*	99.1	101.9	0.19
	SD	15.4	14.7	
Social Responsibility	*M*	97.4	105.3	0.52
	SD	15.5	14.8	
Decision Making Composite	*M*	98.3	104.2	0.38
	SD	15.6	14.9	
Problem Solving	*M*	98.7	102.1	0.22
	SD	15.4	14.7	
Reality Testing	*M*	98.4	103.7	0.34
	SD	15.7	15.0	
Impulse Control	*M*	99.0	104.2	0.33
	SD	15.8	15.1	
Stress Management Composite	*M*	97.9	103.0	0.33
	SD	15.6	14.9	
Flexibility	*M*	99.2	100.6	0.10
	SD	15.7	15.0	
Stress Tolerance	*M*	97.5	104.1	0.43
	SD	15.4	14.7	
Optimism	*M*	98.4	102.6	0.27
	SD	15.6	14.9	
Happiness	*M*	98.9	101.7	0.18
	SD	15.7	15.0	

Note. Sample sizes vary due to missing data: High school or less, N = 1,748–1,751; Post-secondary Graduate, N = 402. Positive *d* values represent higher scores in post-secondary graduates, negative *d* values represent higher scores in high school or less group.

Table A.30. Demographic Characteristics of EQ-i 2.0 Clinical and Matched General Population Samples

The following table summarizes the demographic characteristics of the depressed/dysthymic, other clinical, and matched general population groups used in validity analyses of the EQ-i 2.0. Ideally, these groups should include representation from a wide range of demographic groups, and the general population group should be demographically similar to the depressed/dysthymic and other clinical groups, as was the case in the samples.

Demographic		Depressed/Dysthymic		Other Clinical		Matched General Population	
		N	%	*N*	%	*N*	%
Gender	Male	33	42.9	27	54.0	49	49.0
	Female	44	57.1	23	46.0	51	51.0
Age Group (Years)	18–29	12	15.6	9	18.0	17	17.0
	30–39	14	18.2	10	20.0	18	18.0
	40–49	14	18.2	9	18.0	19	19.0
	50–59	21	27.3	7	14.0	20	20.0
	60+	16	20.8	15	30.0	26	26.0
	M (SD)	46.2 (15.1)		46.2 (14.7)		46.3 (14.8)	
Race/Ethnicity	Black	0	0.0	0	0.0	0	0.0
	Hispanic/Latino	1	1.3	3	6.0	4	4.0
	White	72	93.5	43	86.0	89	89.0
	Other	4	5.2	4	8.0	7	7.0
Education Level	High School or Less	5	6.5	6	12.0	30	30.0
	Some College/University	24	31.2	19	38.0	28	28.0
	College/University or Higher	48	62.3	25	50.0	42	42.0
U.S. Geographic Region	Northeast	19	24.7	11	22.0	21	21.0
	Midwest	12	15.6	13	26.0	25	25.0
	South	26	33.8	13	26.0	31	31.0
	West	20	26.0	13	26.0	23	23.0
	Total	**77**	**100.0**	**50**	**100.0**	**100**	**100.0**

Table A.31. EQ-i 2.0 Clinical Differences

The following table provides means and standard deviations of EQ-i 2.0 Total EI scores, composite scales, and subscales in the depressed/dysthymic, other clinical, and matched general population samples. *F* and *p* values provide statistical significance tests for the overall difference among the groups. *d* values provide an effect size for evaluating differences as small, medium, or large. Validity of the EQ-i 2.0 is supported by the meaningfully higher scores (i.e., $d \geq .20$) found in the general population group relative to the depressed/dysthymic and other clinical groups for most EQ-i 2.0 scales.

Scale		DD. Depressed/ Dysthymic	OC. Other Clinical	GP. General Population	*F* (2, 221)	*p*	Cohen's *d*	
							GP vs DD	GP vs OC
Total EI	*M*	88.9	90.9	98.3	7.89	< .001	0.57	0.45
	SD	16.5	16.5	16.5				
Self-Perception Composite	*M*	87.0	92.6	98.1	9.35	< .001	0.66	0.32
	SD	16.9	16.9	16.8				
Self-Regard	*M*	84.6	89.6	99.4	19.51	< .001	0.93	0.61
	SD	16.0	16.0	16.0				
Self-Actualization	*M*	89.7	95.5	97.9	4.96	.008	0.47	0.14
	SD	17.2	17.2	17.1				
Emotional Self-Awareness	*M*	94.6	97.6	97.5	0.73	.481	0.17	-0.01
	SD	17.1	17.1	17.0				
Self-Expression Composite	*M*	94.2	92.6	99.7	4.58	.011	0.36	0.46
	SD	15.5	15.5	15.4				
Emotional Expression	*M*	97.5	96.0	99.3	0.82	.441	0.12	0.21
	SD	15.5	15.5	15.4				
Assertiveness	*M*	96.7	93.7	99.7	2.24	.109	0.18	0.36
	SD	16.6	16.6	16.6				
Independence	*M*	92.3	92.8	100.4	7.83	.001	0.54	0.51
	SD	15.1	15.1	15.0				
Interpersonal Composite	*M*	93.6	97.0	97.5	1.28	.281	0.23	0.03
	SD	16.6	16.6	16.5				
Interpersonal Relationships	*M*	89.8	92.4	97.9	5.66	.004	0.50	0.34
	SD	16.4	16.4	16.3				
Empathy	*M*	96.1	99.4	97.5	0.54	.586	0.08	-0.11
	SD	17.4	17.4	17.4				
Social Responsibility	*M*	98.7	101.3	98.2	0.70	.497	-0.03	-0.20
	SD	15.6	15.5	15.5				
Decision Making Composite	*M*	89.5	88.4	99.2	10.31	< .001	0.58	0.64
	SD	16.7	16.7	16.7				
Problem Solving	*M*	90.1	89.7	99.9	11.19	< .001	0.62	0.65
	SD	15.8	15.7	15.7				
Reality Testing	*M*	92.4	97.0	97.8	2.59	.077	0.33	0.05
	SD	16.2	16.2	16.1				
Impulse Control	*M*	92.9	86.7	100.2	11.44	< .001	0.43	0.80
	SD	16.9	16.9	16.8				
Stress Management Composite	*M*	88.6	89.9	98.6	8.94	< .001	0.59	0.52
	SD	17.0	17.0	16.9				
Flexibility	*M*	94.3	90.1	99.6	6.22	.002	0.33	0.59
	SD	16.1	16.1	16.0				
Stress Tolerance	*M*	90.5	90.7	98.8	6.59	.002	0.49	0.48
	SD	16.9	16.9	16.8				
Optimism	*M*	87.5	94.0	98.4	8.44	< .001	0.62	0.25
	SD	17.5	17.5	17.5				
Happiness	*M*	85.0	91.1	98.8	13.75	< .001	0.79	0.44
	SD	17.5	17.4	17.4				

Note. Depressed/Dysthymic *N* = 77, Other Clinical *N* = 50, General Population *N* = 100. Positive Cohen's *d* values represent higher mean scores in general population group. Guidelines for evaluating |*d*| are .20 = small, .50 = medium, .80 = large.

Table A.32. EQ-i 2.0 Scores by Racial/Ethnic Group in the Normative Sample

The following table displays means and standard deviations of the EQ-i 2.0 Total EI score, composite scales, and subscales in the Black, Hispanic/Latino, and White participants from the EQ-i 2.0 normative sample. *F* values provide statistical significance tests for the overall differences among racial/ethnic groups. Partial η^2 values provide an effect size for describing the overall effect of race/ethnicity as small, medium, or large. Partial η^2 values between .01 and .06, as found in the EQ-i 2.0 normative sample, suggest that any racial/ethnic differences in EQ-i 2.0 scores are small.

Scale		Black	Hispanic/ Latino	White	*F* (2, 3680)	Partial η^2
Total EI	*M*	105.7	104.3	98.8	57.68	.03
	SD	14.7	14.9	14.7		
Self-Perception Composite	*M*	106.0	104.6	98.5	68.81	.04
	SD	14.7	15.0	14.8		
Self-Regard	*M*	105.8	104.5	98.5	65.81	.03
	SD	14.6	14.9	14.7		
Self-Actualization	*M*	104.8	104.2	98.7	49.28	.03
	SD	14.7	14.9	14.7		
Emotional Self-Awareness	*M*	104.4	102.8	99.1	30.48	.02
	SD	14.8	15.1	14.9		
Self-Expression Composite	*M*	105.9	104.0	98.9	55.51	.03
	SD	14.8	15.0	14.8		
Emotional Expression	*M*	102.8	103.0	99.3	18.30	.01
	SD	14.8	15.1	14.9		
Assertiveness	*M*	104.7	103.3	99.0	36.59	.02
	SD	14.8	15.1	14.9		
Independence	*M*	106.5	103.1	99.0	57.08	.03
	SD	14.5	14.7	14.5		
Interpersonal Composite	*M*	103.3	103.7	99.2	27.17	.01
	SD	14.7	14.9	14.7		
Interpersonal Relationships	*M*	103.8	104.0	99.2	32.03	.02
	SD	14.8	15.0	14.8		
Empathy	*M*	101.4	102.2	99.6	7.53	.00
	SD	14.5	14.8	14.6		
Social Responsibility	*M*	103.3	103.2	99.0	26.25	.01
	SD	14.7	14.9	14.7		
Decision Making Composite	*M*	105.2	102.2	99.3	32.32	.02
	SD	14.6	14.9	14.7		
Problem Solving	*M*	104.4	101.9	99.5	23.44	.01
	SD	14.5	14.7	14.5		
Reality Testing	*M*	104.0	102.5	99.3	24.29	.01
	SD	14.8	15.1	14.9		
Impulse Control	*M*	103.7	100.8	99.7	13.42	.01
	SD	14.9	15.2	15.0		
Stress Management Composite	*M*	104.1	103.9	99.0	36.11	.02
	SD	14.8	15.0	14.8		
Flexibility	*M*	103.8	103.4	99.1	28.07	.02
	SD	15.0	15.2	15.0		
Stress Tolerance	*M*	102.9	102.6	99.4	17.36	.01
	SD	14.6	14.8	14.6		
Optimism	*M*	103.5	103.7	99.1	29.30	.02
	SD	14.8	15.1	14.9		
Happiness	*M*	101.6	104.4	99.2	23.92	.01
	SD	14.9	15.2	15.0		

Note. Samples sizes vary due to missing data: Black, *N* = 419, Hispanic/Latino, *N* = 433, White, *N* = 2,831–2,834. All *F*-test values significant at $p < .001$. Guidelines for evaluating partial η^2 are .01 = small; .06 = medium; .14 = large.

Table A.33. Comparison of Simulation and Control Samples on EQ-i 2.0 Positive Impression and Negative Impression Scale Scores

The following table provides the means and standard deviations for the control and simulation (i.e., fake good/fake bad) groups for the EQ-i 2.0 Positive Impression (PI) and Negative Impression (NI) scales. *F* and *p* values provide statistical significance tests for the difference between groups. *d* values provide an effect size for evaluating differences as small, medium, or large. The validity of the PI and NI scales is supported by the meaningfully higher scores (i.e., $d \geq .20$) found in the simulation group relative to the control group.

	Control Group		Simulation				
Response Style Scale	*M*	*SD*	*M*	*SD*	*F* (1, 194)	*p*	*d*
Positive Impression	0.2	0.9	0.6	0.9	9.36	.003	0.61
Negative Impression	0.2	1.3	1.2	1.3	31.69	< .001	1.12

Note. *N* = 100 for each group. Positive Cohen's *d* values represent higher means in simulation samples. Guidelines for evaluating |*d*| are .20 = small, .50 = medium, .80 = large.

Table A.34. Frequencies and Descriptive Statistics of Inconsistency Index Scores in EQ-i 2.0 Normative and Random Samples

The following table displays the proportion of participants in the EQ-i 2.0 normative sample and the sample of computer-generated random EQ-i 2.0 responses at each score on the EQ-i 2.0 Inconsistency Index (IncX). The mean and standard deviation of the IncX for each sample is also provided. *d* provides an effect size for evaluating the difference between the IncX scores of the two groups as small, medium, or large. The validity of the IncX scale is supported by the meaningfully higher scores (i.e., $d \geq .20$) found in the random sample relative to the normative sample. The validity of the choice of IncX scale cutoff (i.e., 3) for identifying participants as potentially invalid would also be supported if it classifies a high proportion of random respondents as potentially invalid, as found in the EQ-i 2.0.

Inconsistency Index Score	Normative Sample		Random Sample	
	N	%	*N*	%
10	0	0.0	1	0.0
9 or higher	0	0.0	28	0.7
8 or higher	1	0.0	152	3.8
7 or higher	3	0.1	543	13.6
6 or higher	5	0.1	1,293	32.3
5 or higher	23	0.6	2,287	57.2
4 or higher	60	1.5	3,172	79.3
3 or higher	**140**	**3.5**	**3,733**	**93.3**
2 or higher	455	11.4	3,939	98.5
1 or higher	1,449	36.2	3,994	99.9
0 or higher	4,000	100.0	4,000	100.0
M (SD)	**0.5 (0.9)**		**4.8 (1.6)**	
Cohen's *d*	**3.36**			

Note. An IncX score of 3 is used to indicate a potentially inconsistent response style. Positive Cohen's *d* values represent higher means in the random sample. Guidelines for evaluating |*d*| are .20 = small, .50 = medium, .80 = large.

For all tables in this section, the "rater" refers to the person completing the assessment, and the "ratee" refers to the person being rated.

EQ 360 2.0 Tables and Figures

Table A.35. Demographic Description of EQ 360 2.0 Pilot Data (Ratees)

The following table summarizes the demographic characteristics of the person being rated (i.e., ratees) in the EQ 360 2.0 pilot data sample. Ideally, this sample should include representation from a wide range of demographic groups, as found in the EQ 360 2.0 pilot data.

Demographic		*N*	%
Ratee Gender	Male	299	39.4
	Female	449	59.2
	Missing	11	1.4
Ratee Age Group (Years)	18–29	167	22.0
	30–39	245	32.3
	40–49	145	19.1
	50–59	134	17.7
	60+	68	9.0
Ratee Race/Ethnicity	Black	54	7.1
	Hispanic/Latino	42	5.5
	White	564	74.3
	Other	99	13.0
	Total	**759**	**100.0**

Table A.36. Comparison of EQ 360 2.0 Scores in U.S. and Canadian Samples

The following table provides mean and standard deviations of EQ 360 2.0 scores in U.S. and Canadian samples. *d* values provide an effect size to describe differences between the two countries as small, medium, or large. *F* and *p* values provide statistical significance tests for these differences. The lack of meaningful differences (i.e., $|d| \geq .20$) found between U.S. and Canadian participants supports combining the two countries in the EQ 360 2.0 normative sample.

Scale		U.S.	Canada	Cohen's *d*	*F*	*p*
Total EI	*M*	100.2	97.8	0.16	6.60	.010
	SD	15.0	15.0			
Self-Perception Composite	*M*	100.1	98.8	0.09	1.89	.169
	SD	15.0	15.0			
Self-Regard	*M*	100.2	98.2	0.13	4.19	.041
	SD	15.0	15.0			
Self-Actualization	*M*	100.1	98.9	0.08	1.52	.217
	SD	15.0	15.0			
Emotional Self-Awareness	*M*	100.0	99.8	0.01	0.05	.822
	SD	15.0	15.0			
Self-Expression Composite	*M*	100.2	97.5	0.18	8.27	.004
	SD	15.0	15.0			
Emotional Expression	*M*	100.3	97.0	0.22	11.71	.001
	SD	14.8	14.9			
Assertiveness	*M*	100.1	99.2	0.06	0.75	.386
	SD	15.0	15.0			
Independence	*M*	100.2	97.9	0.16	6.03	.014
	SD	14.9	14.9			
Interpersonal Composite	*M*	100.1	98.5	0.11	3.12	.077
	SD	15.0	15.0			
Interpersonal Relationships	*M*	100.1	98.6	0.10	2.59	.107
	SD	15.0	15.0			
Empathy	*M*	100.2	98.3	0.12	3.69	.055
	SD	14.9	15.0			
Social Responsibility	*M*	100.1	99.0	0.08	1.40	.237
	SD	14.9	15.0			
Decision Making Composite	*M*	100.3	97.0	0.22	12.03	.001
	SD	15.0	15.0			
Problem Solving	*M*	100.3	96.9	0.23	12.72	.000
	SD	14.9	15.0			
Reality Testing	*M*	100.1	98.6	0.10	2.59	.108
	SD	15.0	15.0			
Impulse Control	*M*	100.3	96.7	0.24	14.48	< .001
	SD	15.0	15.0			
Stress Management Composite	*M*	100.2	98.0	0.15	5.46	.019
	SD	15.0	15.0			
Flexibility	*M*	100.2	97.6	0.18	7.71	.006
	SD	14.9	15.0			
Stress Tolerance	*M*	100.1	98.5	0.11	2.87	.090
	SD	14.9	15.0			
Optimism	*M*	100.1	98.4	0.12	3.45	.063
	SD	15.0	15.0			
Happiness	*M*	100.1	99.0	0.07	1.24	.265
	SD	15.0	15.0			

Note. Positive Cohen's *d* values signify higher means in the U.S. group, negative Cohen's *d* values signify higher means in the Canadian group. Sample sizes vary due to missing data: U.S. = 2,925 to 2,928, Canada = 272. *df* for *F*-tests = 1, 3195 (Total EI); 1, 3194 (composites); 1, 3192 (subscales). Guidelines for evaluating $|d|$ are .20 = small, .50 = medium, .80 = large.

Table A.37. Length of Rater/Ratee Relationship: EQ 360 2.0 Normative Sample

The following table describes the raters in the EQ 360 2.0 normative sample in terms of the length of their relationship with the ratee. Ideally, the majority of raters should have a long (at least one year) relationship with ratees to ensure ratings are well-informed, as found in over 90% of the EQ 360 2.0 normative sample.

Length of Relationship to Ratee	*N*	%
Less than 3 Months	0	0.0
3 Months to Under 1 Year	308	9.6
1 to 5 Years	1,285	40.2
6 to 10 Years	522	16.3
Over 10 Years	1,085	33.9
Total	**3,200**	**100.0**

Table A.38. Strength of Rater/Ratee Relationship: EQ 360 2.0 Normative Sample

The following table describes the raters in the EQ 360 2.0 normative sample in terms of the strength of their relationship with the ratee. Ideally, the majority of raters should have a strong (at least "Fairly Well") relationship with ratees to ensure ratings are well-informed, as found in the EQ 360 2.0 normative sample.

How Well Rater Knows Ratee	*N*	%
Not Very Well	0	0.0
Fairly Well	1,346	42.1
Well	793	24.8
Very Well	1,061	33.2
Total	**3,200**	**100.0**

Table A.39. Distribution of Rater Types by Gender: EQ 360 2.0 Normative Sample

The following table describes the ratee gender distribution of the EQ 360 2.0 normative sample within rater types. Ideally, males and females should show similar proportions within rater types to ensure equal representation, as found in the EQ 360 2.0 normative sample.

	Ratee Gender		
Rater Type	Male	Female	Total
Direct Report	400	400	800
Manager	400	400	800
Work Peer	400	400	800
Family/Friend	400	400	800
Total	**1,600**	**1,600**	**3,200**

Table A.40. Ratee Age Group by Gender Distribution: EQ 360 2.0 Normative Sample

The following table describes the gender distribution of the EQ 360 2.0 normative sample within age groups. Ideally, as found in the EQ 360 2.0 normative sample, the groups should show similar proportions, reflecting equal representation of all gender x age groups.

	Ratee Gender					
	Male		Female		Total	
Ratee Age Group (Years)	*N*	%	*N*	%	*N*	%
18–24	118	3.7	124	3.9	242	7.6
25–29	185	5.8	190	5.9	375	11.7
30–34	185	5.8	186	5.8	371	11.6
35–39	191	6.0	189	5.9	380	11.9
40–44	191	6.0	189	5.9	380	11.9
45–49	188	5.9	178	5.6	366	11.4
50–54	183	5.7	189	5.9	372	11.6
55–59	181	5.7	182	5.7	363	11.3
60+	178	5.5	173	5.4	351	10.9
Total	**1,600**	**50.0**	**1,600**	**50.0**	**3,200**	**100.0**

Table A.41. Distribution of Ratee Race/Ethnicity by Rater Type: EQ 360 2.0 Normative Sample

The following table summarizes the racial/ethnic distribution of the EQ 360 2.0 normative sample along with Census information. Ideally, the normative sample should show race/ethnicity proportions similar to Census. Note that separate Census targets are provided for Direct Report rater types (i.e., the ratee is a manager) because racial/ethnic representation for managers is slightly different from the general population. All race/ethnic groups were within 4% of Census, suggesting the normative sample is representative of the general population.

		Rater Type					
		Direct Report			Other Rater Types (Manager, Work Peer, Family/Friend)		
Country	Ratee Race/Ethnicity	*N*	%	Census %	*N*	%	Census %
U.S.	Other	50	6.8	6.7	156	7.1	6.7
	Black	60	8.1	8.3	269	12.3	12.2
	Hispanic/Latino	45	6.1	7.0	274	12.5	15.0
	White	585	79.1	78.0	1489	68.1	66.1
	Total	**740**	**100.0**	**100.0**	**2188**	**100.0**	**100.0**
Canada	White	47	78.3	80.0	177	83.5	80.0
	Non-White	13	21.7	20.0	35	16.5	20.0
	Total	**60**	**100.0**	**100.0**	**212**	**100.0**	**100.0**

Table A.42. Ratee Geographic Region Distribution: EQ 360 2.0 Normative Sample

Country	Ratee Geographic Region	*N*	%	Census %
U.S.	Northeast	515	17.6	18.1
	Midwest	646	22.1	21.9
	South	1,063	36.3	36.7
	West	704	24	23.3
	Total	**2,928**	**100.0**	**100.0**
Canada	West	29	10.7	13.0
	Prairies	31	11.4	17.1
	Central	200	73.5	62.4
	East	12	4.4	7.3
	Total	**272**	**100.0**	**100.0**

The following table summarizes the geographic region distribution of the EQ 360 2.0 normative sample along with Census information. Ideally, the normative sample should show region proportions similar to Census. These results were found for most of the regional groups in the EQ 360 2.0 normative sample, suggesting it is representative of the general population.

Table A.43. Multivariate Effects of Ratee Age, Gender, and Rater Type on EQ 360 2.0 Scores

The following table summarizes the results from the multivariate analyses of covariance (MANCOVAs) conducted on the composite scales and subscales to examine potential effects of gender, age, and rater type, or their respective interactions on EQ 360 2.0 scores in the normative sample. Wilks' lambda ranges from 0.00 to 1.00 and depicts the amount of variance not explained by the demographic variable. *F* and *p* values convey the statistical significance of the demographic variables. Partial η^2 values provide an effect size for describing the effects as small, medium, or large. Meaningful effect sizes (i.e., partial $\eta^2 \geq .01$) suggest differences among participants based on the demographic variable. Because the interaction effects were not significant at the multivariate level, the univaritate effects of the interactions were not explored.

Analysis	Demographic Variable	Wilks' Lambda	*F (df)*	*p*	Partial η^2
Composites	Gender	.969	20.12 (5, 3166)	< .001	.03
	Age	.970	4.87 (20, 10501.38)	< .001	.01
	Rater Type	.932	15.17 (15, 8740.33)	< .001	.02
	Gender x Age	.992	1.26 (20, 10501.38)	.197	.00
	Gender x Rater Type	.996	0.76 (15, 8740.33)	.726	.00
	Age x Rater Type	.974	1.41 (60, 14828.92)	.021	.01
Subscales	Gender	.909	19.76 (16, 3153)	< .001	.09
	Age	.912	4.57(64, 12345.71)	< .001	.02
	Rater Type	.843	11.52 (48, 9455)	< .001	.06
	Gender x Age	.980	1.01 (64, 12345.71)	.450	.01
	Gender x Rater Type	.927	0.97 (48, 9378.60)	.537	.01
	Age x Rater Type	.927	1.26 (192, 30483.87)	.009	.01

Table A.44. Effect Sizes for Gender, Age, and Rater Type Effects in the EQ 360 2.0 Normative Sample

The following table summarizes the effect sizes for the effects of gender, age, and the rater type on the EQ 360 2.0 Total EI score, composite scales and subscales in the normative sample. Meaningful effect sizes (i.e., $|d| \geq .20$; partial $\eta^2 \geq .01$) suggest differences among participants (ratees) based on the demographic variable, and that separate demographic norm groups may be required. The *d* and partial η^2 values found in the EQ 360 2.0 normative sample suggest negligible or very small effects of ratee gender, ratee age, and rater type.

Scale	Ratee Gender (Cohen's *d*)	Ratee Age (partial η^2)	Rater Type (partial η^2)
Total EI	-0.01	.00	.00
Self-Perception Composite	-0.02	.00	.00
Self-Regard	-0.11	.00	.01
Self-Actualization	-0.02	.00	.01
Emotional Self-Awareness	-0.15	.00	.01
Self-Expression Composite	-0.05	.00	.02
Emotional Expression	-0.29	.00	.00
Assertiveness	0.04	.00	.02
Independence	0.13	.01	.04
Interpersonal Composite	-0.12	.00	.01
Interpersonal Relationships	-0.01	.00	.01
Empathy	-0.19	.00	.01
Social Responsibility	-0.11	.01	.00
Decision Making Composite	0.06	.00	.01
Problem Solving	0.14	.00	.02
Reality Testing	0.02	.00	.01
Impulse Control	0.01	.01	.01
Stress Management Composite	0.08	.00	.01
Flexibility	0.04	.01	.01
Stress Tolerance	0.16	.00	.01
Optimism	0.01	.00	.00
Happiness	0.03	.00	.00

Note. $N = 3{,}200$. Positive Cohen's *d* values represent higher scores in males, negative Cohen's *d* values represent higher scores in females. Guidelines for evaluating $|d|$ are .20 = small, .50 = medium, .80 = large. Guidelines for evaluating partial η^2 are .01 = small, .06 = medium, .14 = large.

Table A.45. Ratee Gender Differences in EQ 360 2.0 Scores

The following table provides means and standard deviations for the EQ 360 2.0 Total EI score, composite scales, and subscales for ratings of male and female ratees in the EQ 360 2.0 normative sample. *F* and *p* values convey the statistical significance of gender differences. *p* values less than .01, which were found for a few EQ 360 2.0 scales, suggest differences between male and female ratees.

Scale		Ratee Gender		*F*	*p*
		Male	Female		
Total EI	*M*	99.8	99.8	0.01	.936
	SD	15.6	15.6		
Self-Perception Composite	*M*	99.8	99.9	0.05	.818
	SD	15.6	15.7		
Self-Regard	*M*	101.0	99.1	11.98	.001
	SD	15.6	15.6		
Self Actualization	*M*	99.8	99.9	0.02	.885
	SD	15.6	15.6		
Emotional Self-Awareness	*M*	98.6	101.0	18.65	< .001
	SD	15.6	15.6		
Self-Expression Composite	*M*	99.6	100.2	1.21	.271
	SD	15.5	15.5		
Emotional Expression	*M*	97.7	101.9	60.03	< .001
	SD	15.5	15.5		
Assertiveness	*M*	100.3	99.6	1.66	.198
	SD	15.5	15.5		
Independence	*M*	100.9	98.9	14.27	< .001
	SD	15.2	15.2		
Interpersonal Composite	*M*	99.0	100.7	10.20	.001
	SD	15.6	15.6		
Interpersonal Relationships	*M*	99.9	99.9	0.00	.995
	SD	15.6	15.6		
Empathy	*M*	98.4	101.3	27.97	< .001
	SD	15.5	15.5		
Social Responsibility	*M*	99.1	100.8	8.97	.003
	SD	15.6	15.6		
Decision Making Composite	*M*	100.3	99.4	2.90	.088
	SD	15.6	15.6		
Problem Solving	*M*	100.9	98.9	13.82	< .001
	SD	15.4	15.4		
Reality Testing	*M*	100.0	99.7	0.37	.541
	SD	15.6	15.6		
Impulse Control	*M*	100.0	99.8	0.06	.811
	SD	15.6	15.6		
Stress Management Composite	*M*	100.4	99.0	5.78	.016
	SD	15.6	15.6		
Flexibility	*M*	99.9	99.3	1.04	.307
	SD	15.5	15.5		
Stress Tolerance	*M*	101.1	98.5	22.99	< .001
	SD	15.5	15.5		
Optimism	*M*	100.0	99.7	0.34	.559
	SD	15.6	15.7		
Happiness	*M*	100.2	99.6	1.11	.291
	SD	15.7	15.7		

Note. Sample sizes vary due to missing data: Males, *N* = 1,598–1,600; females, *N* = 1,599–1,600. *df* for *F*-tests = 1, 3190 (Total EI); 1, 3189 (composites); 1, 3187 (subscales). Positive *d* values represent higher mean scores in males, negative *d* values represent higher mean scores in females. Guidelines for evaluating |*d*| = .20 (small); .50 (medium); .80 (large).

Table A.46. Ratee Age Differences in EQ 360 2.0 Scores

The following table provides means and standard deviations for the EQ 360 2.0 Total EI score, composite scales, and subscales for the various Ratee age groups in the EQ 360 2.0 normative sample. *F* and *p* values convey the statistical significance of age differences. *p* values less than .01, which were found for a few EQ 360 2.0 scales, suggest a difference in scores among EQ 360 2.0 ratee age groups.

Scale		Ratee Age					*F*	*p*
		18–29 Years	30–39 Years	40–49 Years	50–59 Years	60+ Years		
Total EI	*M*	98.9	100.8	100.4	100.4	98.5	2.39	.048
	SD	15.2	14.9	15.0	15.0	15.0		
Self-Perception Composite	*M*	99.0	100.8	100.4	100.1	99.1	1.70	.148
	SD	15.2	15.0	15.0	15.0	15.0		
Self-Regard	*M*	99.0	100.3	100.1	100.1	100.6	0.84	.500
	SD	15.1	14.9	14.9	14.9	15.0		
Self Actualization	*M*	98.9	100.9	100.5	100.2	98.6	2.44	.045
	SD	15.1	14.9	14.9	14.9	15.0		
Emotional Self-Awareness	*M*	99.5	100.7	100.4	100.1	98.3	1.84	.118
	SD	15.1	14.9	14.9	14.9	15.0		
Self-Expression Composite	*M*	98.6	100.3	100.9	100.6	98.9	2.89	.021
	SD	15.0	14.8	14.8	14.8	14.9		
Emotional Expression	*M*	100.4	100.3	100.5	99.7	98.2	1.72	.143
	SD	15.1	14.8	14.8	14.9	14.9		
Assertiveness	*M*	98.9	99.8	100.7	100.6	99.8	1.59	.175
	SD	15.1	14.8	14.8	14.9	14.9		
Independence	*M*	97.5	100.6	100.9	101.0	99.4	6.64	< .001
	SD	14.8	14.5	14.5	14.6	14.6		
Interpersonal Composite	*M*	99.0	100.8	99.9	100.4	99.2	1.68	.153
	SD	15.1	14.9	14.9	14.9	15.0		
Interpersonal Relationships	*M*	100.4	100.6	99.7	99.8	98.8	1.17	.324
	SD	15.2	14.9	14.9	15.0	15.0		
Empathy	*M*	99.0	100.9	100.2	100.1	99.1	1.66	.156
	SD	15.1	14.9	14.9	14.9	14.9		
Social Responsibility	*M*	97.4	100.6	99.8	101.6	100.2	6.98	< .001
	SD	15.1	14.9	14.9	14.9	15.0		
Decision Making Composite	*M*	98.4	100.6	100.5	100.8	98.8	3.37	.009
	SD	15.1	14.9	14.9	14.9	15.0		
Problem Solving	*M*	98.5	100.6	100.6	100.5	99.3	2.54	.038
	SD	15.0	14.8	14.8	14.8	14.8		
Reality Testing	*M*	99.2	100.8	100.4	100.3	98.4	2.12	.076
	SD	15.2	14.9	14.9	15.0	15.0		
Impulse Control	*M*	98.3	100.2	100.4	101.3	99.3	3.91	.004
	SD	15.1	14.9	14.9	14.9	15.0		
Stress Management Composite	*M*	100.1	101.0	100.3	99.7	97.4	3.69	.005
	SD	15.1	14.9	14.9	14.9	15.0		
Flexibility	*M*	101.3	101.2	100.4	98.9	96.3	8.97	< .001
	SD	15.1	14.8	14.9	14.9	14.9		
Stress Tolerance	*M*	99.0	100.9	100.5	100.4	98.0	3.33	.010
	SD	15.0	14.8	14.8	14.8	14.9		
Optimism	*M*	100.1	100.5	100.0	99.8	98.6	0.99	.414
	SD	15.2	15.0	15.0	15.0	15.0		
Happiness	*M*	100.6	100.6	99.7	99.6	99.0	1.04	.385
	SD	15.2	15.0	15.0	15.0	15.1		

Note. Sample sizes vary due to missing data: 18–29 Years, *N* = 616–617; 30–39 Years, *N* = 750–751; 40–49 Years, *N* = 746; 50–59 Years, *N* = 746; 60+ Years, *N* = 350–351. *df* for *F*-tests = 4, 3190 (Total EI); 4, 3189 (composites); 4, 3187 (subscales).

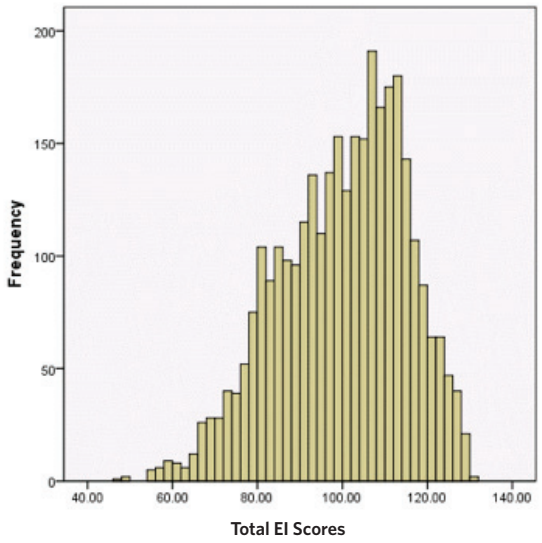
Table A.47. Rater Type Differences in EQ 360 2.0 Scores

The following table provides means and standard deviations for the EQ 360 2.0 Total EI score, composite scales, and subscales for the various rater types in the EQ 360 2.0 normative sample. *F* and *p* values convey the statistical significance of rater type differences.

Scale		Rater Type				*F*	*p*
		Direct Report	Manager	Work Peer	Friend/Family Member		
Total EI	*M*	101.4	98.2	99.5	100.2	5.63	.001
	SD	15.8	15.8	15.6	15.5		
Self-Perception Composite	*M*	101.4	98.5	99.4	100.2	4.89	.002
	SD	15.8	15.8	15.6	15.5		
Self-Regard	*M*	102.4	98.6	100.2	98.9	9.85	< .001
	SD	15.8	15.8	15.6	15.5		
Self Actualization	*M*	101.7	98.6	99.0	100.0	6.25	< .001
	SD	15.8	15.8	15.6	15.5		
Emotional Self-Awareness	*M*	99.1	98.9	99.3	102.0	7.38	< .001
	SD	15.7	15.8	15.5	15.4		
Self-Expression Composite	*M*	103.0	97.1	99.5	99.9	18.78	< .001
	SD	15.7	15.7	15.5	15.3		
Emotional Expression	*M*	99.5	99.9	100.9	98.9	2.24	.082
	SD	15.7	15.7	15.5	15.4		
Assertiveness	*M*	102.9	97.8	98.7	100.5	16.46	< .001
	SD	15.7	15.7	15.5	15.4		
Independence	*M*	104.5	95.6	99.1	100.3	44.86	< .001
	SD	15.4	15.4	15.2	15.1		
Interpersonal Composite	*M*	98.6	99.4	99.8	101.8	6.12	< .001
	SD	15.8	15.8	15.6	15.4		
Interpersonal Relationships	*M*	98.4	99.0	99.9	102.2	9.45	< .001
	SD	15.8	15.8	15.6	15.5		
Empathy	*M*	98.4	99.4	99.6	102.0	8.05	< .001
	SD	15.7	15.7	15.5	15.4		
Social Responsibility	*M*	99.6	100.1	99.9	100.2	0.27	.847
	SD	15.8	15.8	15.6	15.5		
Decision Making Composite	*M*	101.8	98.4	99.9	99.2	7.08	< .001
	SD	15.8	15.8	15.6	15.4		
Problem Solving	*M*	103.2	97.4	100.4	98.5	21.79	< .001
	SD	15.6	15.6	15.4	15.3		
Reality Testing	*M*	99.8	98.7	99.1	101.7	5.75	.001
	SD	15.8	15.8	15.6	15.5		
Impulse Control	*M*	101.7	99.8	100.3	97.8	8.41	< .001
	SD	15.8	15.8	15.6	15.4		
Stress Management Composite	*M*	102.0	98.1	99.2	99.5	8.80	< .001
	SD	15.8	15.8	15.6	15.4		
Flexibility	*M*	102.2	98.5	99.9	97.8	12.48	< .001
	SD	15.7	15.7	15.5	15.4		
Stress Tolerance	*M*	102.2	97.8	99.3	99.8	10.79	< .001
	SD	15.7	15.7	15.5	15.4		
Optimism	*M*	100.9	98.7	98.8	100.8	4.83	.002
	SD	15.8	15.8	15.6	15.5		
Happiness	*M*	100.7	98.7	99.9	100.2	2.34	.072
	SD	15.9	15.9	15.6	15.5		

Note. Sample sizes vary due to missing data: Direct Report, *N* = 798–800; Manager, *N* = 799–800; Work Peer, *N* = 800; Family/Friend, *N* = 800. *df* for *F*-tests = 3, 3190 (Total EI); 3, 3189 (composites); 3, 3187 (subscales).

Figure A.2. Histogram of EQ 360 2.0 Total EI Standard Score in the Normative Sample



This figure illustrates the distribution of EQ 360 2.0 Total EI scores in the normative sample. Distributions that approximate a normal ("bell-shaped") curve, such as in the figure to the left, suggest it is unnecessary to apply a normalizing transformation to EQ 360 2.0 scores.

Table A.48. Internal Consistency: EQ 360 2.0 Normative Sample

The following table summarizes the internal consistency (Cronbach's alpha) values for the EQ 360 2.0 Total EI score, composite scales, and subscales in the EQ 360 2.0 normative sample. Alpha values range from 0.00 to 1.00. Higher values, as found in the EQ 360 2.0 normative sample, support the excellent reliability of the EQ 360 2.0.

Scale	# of items	EQ 360 2.0 Normative Sample
Total EI	118	.98
Self-Perception Composite	24	.94
Self-Regard	8	.87
Self-Actualization	9	.92
Emotional Self-Awareness	7	.86
Self-Expression Composite	23	.89
Emotional Expression	8	.82
Assertiveness	7	.79
Independence	8	.85
Interpersonal Composite	23	.96
Interpersonal Relationships	8	.92
Empathy	9	.94
Social Responsibility	6	.87
Decision Making Composite	24	.94
Problem Solving	8	.90
Reality Testing	8	.89
Impulse Control	8	.86
Stress Management Composite	24	.95
Flexibility	8	.86
Stress Tolerance	8	.90
Optimism	8	.92
Well-Being Indicator	8	.92

Note. N = 3,200.

Table A.49. Demographic Characteristics of EQ 360 2.0 Test-Retest Sample

The following table summarizes the demographic characteristics of the EQ 360 2.0 test-retest sample. Ideally, this sample should include representation from a wide range of demographic groups, as found in the EQ 360 2.0 test-retest sample.

Note. All demographic variables represent ratees except Rater Type. Mean and standard deviation for age was unavailable. Region value for one participant was Canada. Time interval mean = 19.3 days (*SD* = 2.4 days), range = 14–23 days.

Demographic		*N*	%
Ratee Gender	Male	100	49.3
	Female	103	50.7
Ratee Race/Ethnicity	Black	45	22.2
	Hispanic/Latino	30	14.8
	White	112	55.2
	Other	16	7.9
Ratee Age Group (Years)	18–29	52	25.6
	30–39	48	23.6
	40–49	45	22.2
	50–59	43	21.2
	60+	15	7.4
Ratee U.S. Geographic Region	Northeast	29	14.3
	Midwest	39	19.2
	South	84	41.4
	West	50	24.6
Rater Type	Direct report	23	11.3
	Manager	51	25.1
	Work Peer	96	47.3
	Friend/Family Member	33	16.3
	Total	**203**	**100.0**

Table A.50. EQ 360 2.0 Test-Retest Correlations and Descriptive Statistics

The following table displays the test-retest correlations, as well as Time 1 and Time 2 means and standard deviations for the EQ 360 2.0 Total EI score, composite scales, and subscales. Correlations range from 0.00 to 1.00. Higher values, as found in the EQ 360 2.0, suggest very good test-retest reliability.

Scale	Test-retest *r*	Time 1		Time 2	
		M	*SD*	*M*	*SD*
Total EI	.89	98.4	14.9	98.2	16.0
Self-Perception Composite	.83	98.3	14.8	98.9	16.1
Self-Regard	.82	98.5	14.7	99.0	15.5
Self-Actualization	.81	98.2	14.8	98.6	16.0
Emotional Self-Awareness	.78	98.8	15.0	99.4	16.0
Self-Expression Composite	.84	98.2	14.6	98.0	15.8
Emotional Expression	.79	99.6	14.2	99.2	13.9
Assertiveness	.76	98.8	14.8	98.6	15.2
Independence	.84	97.5	15.7	97.4	16.9
Interpersonal Composite	.89	98.2	15.2	98.3	15.6
Interpersonal Relationships	.89	98.3	15.9	98.0	16.1
Empathy	.86	98.3	15.4	98.2	15.5
Social Responsibility	.84	98.5	14.5	99.4	15.1
Decision Making Composite	.86	98.9	14.5	98.1	15.8
Problem Solving	.82	98.8	15.4	98.1	16.3
Reality Testing	.83	98.7	14.5	98.7	15.4
Impulse Control	.78	99.7	14.0	98.4	15.4
Stress Management Composite	.89	98.8	15.3	98.4	16.3
Flexibility	.81	99.5	15.5	98.3	15.9
Stress Tolerance	.85	99.3	14.9	98.4	15.9
Optimism	.85	98.1	15.5	98.9	15.9
Happiness	.87	98.4	15.0	98.7	15.8

Note. *N* = 203.

Table A.51. Differences between Time 1 and Time 2 EQ 360 2.0 Standard Scores

The following table summarizes the differences between Time 1 and Time 2 scores for the EQ 360 2.0 Total EI score, composite scales, and subscales. The first set of results (% of Respondents) lists the percentage of respondents whose scores decreased by more than 15 points, changed by 15 points or less, or increased by more than 15 points over time. Test-retest stability is supported if the majority of respondents show changes of 15 points or less over time, as found in the EQ 360 2.0. The mean and standard deviation of these differences across participants is also provided, along with the 95% confidence interval (CI), which illustrates whether the difference is statistically meaningful for the sample as a whole. That is, if the CI includes zero between the lower bound (LB) and upper bound (UB), as found for the majority of EQ 360 2.0 scales, the difference is not statistically meaningful.

	% of Respondents					95% CI	
Scale	Scores Decreased More than 1 *SD* (15 Points)	Scores Changed by 1 *SD* or Less (15 Points)	Scores Increased More than 1 *SD* (15 Points)	*M* Diff	*SD*	LB	UB
Total EI	3.4	95.1	1.5	-0.2	7.4	-0.9	0.6
Self-Perception Composite	3.4	92.1	4.4	0.6	9.1	-0.3	1.6
Self-Regard	2.5	92.2	5.4	0.5	9.2	-0.5	1.6
Self-Actualization	2.5	94.5	3.0	0.4	9.6	-0.7	1.4
Emotional Self-Awareness	3.0	90.6	6.4	0.8	10.4	-0.1	1.7
Self-Expression Composite	3.9	93.6	2.5	-0.3	8.6	-1.1	0.6
Emotional Expression	4.4	90.2	5.4	-0.4	9.2	-1.3	0.6
Assertiveness	7.9	85.3	6.9	-0.2	10.5	-1.1	0.7
Independence	3.9	93.6	2.5	-0.1	9.2	-1.0	0.9
Interpersonal Composite	3.0	95.6	1.5	0.1	7.3	-0.6	0.8
Interpersonal Relationships	2.0	96.1	2.0	-0.3	7.4	-1.2	0.5
Empathy	3.0	94.5	2.5	-0.1	8.1	-0.9	0.7
Social Responsibility	1.5	95.1	3.4	1.0	8.5	0.2	1.7
Decision Making Composite	4.9	94.1	1.0	-0.8	8.2	-1.6	0.0
Problem Solving	4.9	91.7	3.4	-0.7	9.6	-1.7	0.3
Reality Testing	3.4	94.6	2.0	0.0	8.9	-1.0	1.0
Impulse Control	6.9	90.1	3.0	-1.4	9.7	-2.2	-0.5
Stress Management Composite	3.9	95.1	1.0	-0.5	7.6	-1.2	0.3
Flexibility	5.9	89.7	4.4	-1.2	9.7	-2.2	-0.3
Stress Tolerance	5.4	92.6	2.0	-0.9	8.4	-1.7	0.0
Optimism	4.9	93.6	1.5	0.8	8.5	0.0	1.7
Happiness	3.4	93.6	3.0	0.3	8.0	-0.6	1.1

Note. *N* = 203. *M* Diff = mean difference; CI = confidence interval; LB = lower bound, UB = upper bound.

Table A.52. Correlations among EQ 360 2.0 Composite Scales (Normative Sample)

The following table illustrates the correlations among the EQ 360 2.0 composite scales in the EQ 360 2.0 normative sample. Correlations range from 0.00 to 1.00, with higher values suggesting the scales share a relevant common psychological characteristic (i.e., emotional intelligence). Moderately sized correlations, like those that were found in the EQ 360 2.0, support both the concept that the scales measure a common psychological characteristic, as well as the multidimensional factor structure of the EQ 360 2.0.

Composite Scale	SP	SE	IS	DM	SM
SP. Self-Perception Composite	–				
SE. Self-Expression Composite	.79	–			
IS. Interpersonal Composite	.81	.64	–		
DM. Decision Making Composite	.8	.74	.74	–	
SM. Stress Management Composite	.85	.75	.80	.86	–

Note. *N* = 3,200. All correlations significant at $p < .01$. Guidelines for evaluating *r* are .10 = small, .30 = medium, .50 = large.

Table A.53. Correlations among EQ 360 2.0 Subscales (Normative Sample)

The following table illustrates the correlations among the EQ 360 2.0 subscales in the EQ 360 2.0 normative sample. Correlations range from 0.00 to 1.00, with higher values suggesting the scales share a relevant common psychological characteristic (i.e., emotional intelligence). Shaded cells portray correlations of subscales within their respective composite scales. Moderate correlations support the multidimensional factor structure of the EQ 360 2.0.

	Self-Perception			Self-Expression			Interpersonal			Decision Making			Stress Management			HA
Scale	SR	SA	ES	EE	AS	IN	IR	EM	RE	PS	RT	IC	FL	ST	OP	
SR. Self-Regard	–															
SA. Self-Actualization	.72	–														
ES. Emotional Self-Awareness	.54	.67	–													
EE. Emotional Expression	.51	.49	.56	–												
AS. Assertiveness	.58	.62	.53	.41	–											
IN. Independence	.64	.63	.4	.37	.6	–										
IR. Interpersonal Relationships	.59	.71	.67	.61	.45	.43	–									
EM. Empathy	.49	.68	.76	.59	.4	.37	.81	–								
RE. Social Responsibility	.56	.76	.65	.5	.48	.43	.71	.75	–							
PS. Problem Solving	.68	.68	.5	.48	.54	.8	.55	.53	.53	–						
RT. Reality Testing	.64	.79	.82	.52	.6	.56	.74	.8	.72	.66	–					
IC. Impulse Control	.43	.49	.42	.31	.23	.5	.45	.54	.47	.67	.55	–				
FL. Flexibility	.57	.58	.51	.57	.35	.6	.61	.59	.53	.74	.61	.6	–			
ST. Stress Tolerance	.7	.78	.63	.46	.59	.69	.66	.64	.63	.8	.78	.6	.69	–		
OP. Optimism	.72	.78	.66	.54	.47	.5	.77	.74	.71	.64	.74	.5	.63	.75	–	
HA. Happiness	.8	.76	.62	.59	.48	.52	.77	.68	.67	.63	.71	.48	.63	.71	.87	–

Note. N = 3,200. All correlations significant at $p < .01$. Cutoffs for evaluating r are .10 = small, .30 = medium, .50 = large. Shaded cells represent subscale groupings within composite scales.

Table A.54. Demographic Distribution of Self-Other Agreement Sample

The following table summarizes the demographic characteristics of the EQ 360 2.0 self-other agreement sample. Ideally, this sample should include representation from a wide range of demographic groups, as found in the EQ 360 2.0 self-other agreement sample.

Demographic		*N*	%
Ratee Gender	Male	52	48.1
	Female	56	51.9
Ratee Race/Ethnicity	Black	4	3.7
	Hispanic/Latino	26	24.1
	White	77	71.3
	Other	1	0.9
Ratee Age Group (Years)	18–29	19	17.6
	30–39	43	39.8
	40–49	29	26.9
	50–59	14	13.0
	60+	3	2.8
	M (SD)	38.9 (10.3)	
Ratee U.S. Geographic Region	Northeast	35	32.4
	Midwest	11	10.2
	South	62	57.4
	West	0	0.0
Ratee Education Level	High school or less	19	17.6
	Some college	27	25.0
	College or higher	62	57.4
	Total	**108**	**100.0**

Table A.55. Self-Other Agreement Correlations between the EQ-i 2.0 and EQ 360 2.0

The following table summarizes the self (EQ-i 2.0) – other (EQ 360 2.0) agreement correlations for the Total EI score, composite scales, and subscales. Correlations range from 0.00 to 1.00, with higher values suggesting higher levels of self-other agreement. Moderate correlations, like those found in this study, provide support for the validity of the EQ 360 2.0. That is, small correlations would indicate a lack of self-other agreement, and very high correlations would indicate redundancy in capturing both self and other ratings. The moderately sized correlations support the validity of the EQ 360 2.0 and provide support for collecting both self and rater reports.

Scale	Self-Other Agreement (*r*)	EQ-i 2.0		EQ 360 2.0	
		M	*SD*	*M*	*SD*
Total EI	.60	102.7	15.4	103.9	14.3
Self-Perception Composite	.57	104.7	15.0	105.6	17.1
Self-Regard	.61	101.7	15.3	99.9	18.4
Self-Actualization	.51	105.9	13.3	106.1	14.8
Emotional Self-Awareness	.52	105.0	15.4	108.7	16.7
Self-Expression Composite	.66	101.4	16.3	102.3	15.0
Emotional Expression	.50	101.5	15.4	99.9	17.5
Assertiveness	.56	102.9	16.9	104.2	14.9
Independence	.59	99.0	17.0	101.7	14.1
Interpersonal Composite	.65	105.3	15.8	106.4	14.3
Interpersonal Relationships	.55	103.7	15.3	104.6	13.5
Empathy	.65	104.5	15.6	107.3	15.0
Social Responsibility	.59	105.6	15.0	105.3	14.7
Decision Making Composite	.54	101.2	16.9	103.2	13.4
Problem Solving	.55	97.8	16.7	99.5	12.6
Reality Testing	.52	106.1	15.4	108.9	15.0
Impulse Control	.52	99.6	16.9	100.1	14.4
Stress Management Composite	.52	98.8	13.9	100.0	13.0
Flexibility	.49	93.5	15.3	94.0	15.1
Stress Tolerance	.44	99.6	15.5	101.2	13.1
Optimism	.70	103.3	13.5	104.2	15.1
Happiness	.72	102.6	13.1	102.2	16.0

Note. $N = 108$. All correlations significant at $p < .01$. Guidelines for evaluating *r* are .10 = small, .30 = medium, .50 = large.

Table A.56. Comparison of EQ-i 2.0 and EQ 360 2.0 Standard Scores

The following table summarizes the differences between self (EQ-i 2.0) and other (EQ 360 2.0) scores for the EQ-i 2.0/EQ 360 2.0 Total EI score, composite scales, and subscales. This table lists the percentage of respondents who showed EQ 360 2.0 scores that were higher than their EQ-i 2.0 scores by more than 10 points, scores that differed by 10 points or less, and those whose EQ-i 2.0 scores were higher than their EQ 360 2.0 scores by more than 10 points. Self-other agreement (or self-other consistency) is supported if many respondents show differences of 10 points or less, as found in the EQ 360 2.0 self-other agreement sample.

Scale	% of Respondents		
	EQ 360 2.0 Scores Higher by > 10 Points	Scores Differ by 10 Points or Less	EQ-i 2.0 Scores Higher by > 10 Points
Total EI	23.1	59.3	17.6
Self-Perception Composite	21.3	61.1	17.6
Self-Regard	16.7	61.1	22.2
Self-Actualization	21.3	62.0	16.7
Emotional Self-Awareness	32.4	50.9	16.7
Self-Expression Composite	19.4	63.9	16.7
Emotional Expression	27.8	58.3	13.9
Assertiveness	22.2	60.2	17.6
Independence	27.8	53.7	18.5
Interpersonal Composite	25.0	61.1	13.9
Interpersonal Relationships	21.3	63.9	14.8
Empathy	27.8	58.3	13.9
Social Responsibility	20.4	56.5	23.1
Decision Making Composite	30.6	50.0	19.4
Problem Solving	27.8	53.7	18.5
Reality Testing	28.7	53.7	17.6
Impulse Control	25.9	50.0	24.1
Stress Management Composite	26.9	57.4	15.7
Flexibility	23.1	56.5	20.4
Stress Tolerance	28.7	54.6	16.7
Optimism	14.8	68.5	16.7
Happiness	15.7	67.6	16.7

Table A.57. Demographic Characteristics of SAS-SR Validity Sample

The following table summarizes the demographic characteristics of the Social Adjustment Scale – Self-Report (SAS-SR ; Weissman, 1999) validity sample. Ideally, this sample should include representation from a wide range of demographic groups, as found in the SAS-SR validity sample.

Demographic		*N*	%
Ratee Gender	Male	52	48.1
	Female	56	51.9
Ratee Age Group (Years)	18–29	19	17.6
	30–39	43	39.8
	40–49	29	26.9
	50–59	14	13.0
	60+	3	2.8
	M (SD)	38.9 (10.3)	
Ratee Race/Ethnicity	Black	4	3.7
	Hispanic/Latino	26	24.1
	White	77	71.3
	Other	1	0.9
Ratee Education Level	High School or Less	19	17.6
	Some College/University	27	25.0
	College/University or Higher	62	57.4
Ratee U.S. Geographic Region	Northeast	35	32.4
	Midwest	11	10.2
	South	62	57.4
	West	0	0.0
	Total	**108**	**100.0**

Table A.58. Multiple Regression Results for EQ-i 2.0 and EQ 360 2.0 Predicting Social Adjustment Scale–Self-Report Total Scores

The following table summarizes the extent to which the EQ-i 2.0 and EQ 360 2.0 are independently related to Social Adjustment Scale–Self-Report (SAS–SR) scores. Significant ($p < .05$) beta (β)values demonstrate independent associations with SAS–SR scores. Significant ($p < .05$) f^2 values, as found for the EQ 360 2.0 Total EI score and many composite scales and subscales suggest the EQ 360 2.0 provides added value over the EQ-i 2.0 in relation to SAS–SR scores.

	R		Step 1 EQ-i 2.0		Step 2 EQ-i 2.0		Step 2 EQ 360 2.0		R^2			
Scale	EQ-i 2.0	EQ 360 2.0	β	*p*	β	*p*	β	*p*	Step 1	Step 2	R^2 change	f^2
Total EI	-.45	-.42	-.45	< .01	-.31	.01	-.23	.03	.20	.24	.03	.04
Self-Perception Composite	-.45	-.43	-.45	< .01	-.3	.01	-.26	.01	.20	.25	.05	.06
Self-Regard	-.50	-.46	-.50	< .01	-.35	< .01	-.25	.02	.25	.29	.04	.05
Self-Actualization	-.38	-.39	-.38	< .01	-.24	.02	-.27	.01	.14	.19	.05	.06
Emotional Self-Awareness	-.25	-.33	-.25	.01	-.11	.30	-.27	.01	.06	.12	.05	.06
Self-Expression Composite	-.51	-.39	-.51	< .01	-.44	< .01	-.10	.35	.26	.26	.01	.01
Emotional Expression	-.41	-.29	-.41	< .01	-.35	< .01	-.11	.27	.17	.18	.01	.01
Assertiveness	-.34	-.3	-.34	< .01	-.26	.02	-.15	.17	.12	.13	.02	.02
Independence	-.41	-.33	-.41	< .01	-.34	< .01	-.13	.23	.17	.18	.01	.01
Interpersonal Composite	-.27	-.38	-.27	< .01	-.04	.71	-.35	< .01	.07	.15	.07	.09
Interpersonal Relationships	-.30	-.37	-.30	< .01	-.14	.20	-.29	.01	.09	.15	.06	.07
Empathy	-.18	-.36	-.18	.06	.10	.41	-.43	< .01	.03	.14	.11	.12
Social Responsibility	-.24	-.30	-.24	.01	-.11	.36	-.23	.04	.06	.10	.04	.04
Decision Making Composite	-.38	-.35	-.38	< .01	-.26	.01	-.21	.05	.14	.17	.03	.04
Problem Solving	-.42	-.37	-.42	< .01	-.32	< .01	-.19	.07	.18	.21	.03	.03
Reality Testing	-.21	-.37	-.21	.03	-.02	.84	-.36	< .01	.04	.14	.09	.11
Impulse Control	-.26	-.15	-.26	.01	-.26	.02	-.02	.89	.07	.07	.00	.00
Stress Management Composite	-.31	-.31	-.31	< .01	-.20	.06	-.21	.06	.10	.13	.03	.04
Flexibility	-.08	-.11	-.08	.42	-.03	.76	-.09	.42	.01	.01	.01	.01
Stress Tolerance	-.25	-.29	-.25	.01	-.15	.15	-.22	.04	.06	.10	.04	.04
Optimism	-.40	-.35	-.40	< .01	.29	.02	-.15	.23	.16	.17	.01	.01
Happiness	-.56	-.43	-.56	< .01	-.51	< .01	-.07	.57	.31	.31	.00	.00

Note. $N = 108$. Correlations of .19 and above are significant at $p < .05$, correlations of .25 and above are significant at $p < .01$. Guidelines for evaluating *r* are .10 = small, .30 = medium, .50 = large. Guidelines for evaluating f^2 are .02 = small, .15 = medium, .35 = large.

Table A.59. Interaction Effects between Rater Race/Ethnicity and Ratee Race/Ethnicity: EQ 360 2.0 Normative Sample

The following table summarizes the results from the analysis of covariance (ANCOVA) and multivariate analyses of covariance (MANCOVAs) conducted on the composite scales and subscales to examine potential effects of ratee race, rater race, and the interaction between the two on EQ 360 2.0 scores in the normative sample. Wilks' lambda ranges from 0.00 to 1.00 and depicts the amount of variance not explained by the demographic variable. *F* and *p* values convey the statistical significance of the demographic variables. Partial η^2 values provide an effect size for describing the effects as small, medium, or large. The effect sizes found (all less than .06) suggest negligible differences among participants based on rater and ratee race.

Analysis	Effect	Wilks' Lambda	*F (df)*	*p*	partial η^2
Total EI	Rater Race (White vs. non-White)	n/a	0.10 (1, 2948)	.757	.00
	Ratee Race (Black vs. Hispanic/Latino vs. White)	n/a	1.95 (2, 2948)	.143	.00
	Rater Race x Ratee Race	n/a	2.41 (2, 2948)	.09	.00
Composite Scales	Rater Race (White vs. non-White)	.994	3.46 (5, 2944)	.004	.01
	Ratee Race (Black vs. Hispanic/Latino vs. White)	.995	1.43 (10, 5888)	.160	.00
	Rater Race x Ratee Race	.995	1.48 (10, 5888)	.141	.00
Subscales	Rater Race (White vs. non-White)	.980	3.72 (16, 2931)	< .001	.02
	Ratee Race (Black vs. Hispanic/Latino vs. White)	.980	1.89 (32, 5862)	.002	.01
	Rater Race x Ratee Race	.982	1.68 (32, 5862)	.010	.01

Note. *N* = 2,956. *F*-test values represent univariate effects for the Total EI score and multivariate effects for the composite scales and subscales. Guidelines for evaluating partial η^2 are .01 = small; .06 = medium; .14 = large. n/a = not applicable.

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