**U.S. Army Research Institute
for the Behavioral and Social Sciences**

Research Report 1833

Special Forces Interpersonal Performance Assessment System

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14. ABSTRACT *(Maximum 200 words)*:
The role of the U.S. Army in the Global War on Terror includes not just war activities but peacekeeping and nation building as well. Soldiers confront complex cultural and political situations that are delicate and unstable. Success in these missions often requires interpersonal skills, enabling Soldiers to accurately perceive multiple perspectives and interact successfully within other cultures. Despite the fact that these skill areas are of great importance, few resources exist to provide Soldiers with information regarding their strengths and weaknesses in these areas, or to provide developmental training activities that could improve these skills. This report describes the development of a model that can serve as a foundation to develop these skills. An evaluation of the model and the application of the model to develop a training program are discussed.

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FOREWORD

The U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) conducts research on manpower, personnel performance, leader development and training in support of Army goals. New and increasing demands are being placed on Soldiers as the Army transitions to meet the demands of the Global War on Terror. These include the need for interpersonal skills to form cooperative relationships across cultural settings for missions such as peacekeeping and nation building. As the Army transitions to meet the demands of the new millennium, Soldiers will need to effectively make use of these skills in order to meet mission requirements.

The objective of the present research is to provide leaders with innovative tools that can be used within a unit to assess and develop interpersonal skills. One of the first steps required is to develop a tool that defines successful and unsuccessful performance. This report describes initial steps completed toward this goal, through the development and validation of rating scales focused specifically on interpersonal performance.

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Technical Director

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SPECIAL FORCES INTERPERSONAL PERFORMANCE ASSESSMENT SYSTEM

EXECUTIVE SUMMARY

Research Requirement:

The role of the U.S. Army and its Soldiers requires interpersonal skills such as coordinating, managing, and interacting successfully with members of other military services, other government agencies, and other cultures. Despite the importance of these skills, little formal training is available to help Soldiers improve. In addition, little or no guidance is available to assist leaders in assessing or developing Soldiers who have weaknesses in these areas. A system is required that can be used within a unit to assist leaders with the assessment and development of interpersonal performance skills. This report describes the results of the first phase of a multi-year effort that would provide this type of system.

Procedure:

This research was conducted as part of the Department of the Army's Small Business Innovation Research (SBIR) program and as such is divided into two distinct phases. The first phase, described in this report, provided an interpersonal performance assessment system for Soldiers. In the second phase, this assessment system will serve as the foundation for the development of training materials and a training system.

There were three primary steps in the development of the Phase I interpersonal performance assessment system: selection of the target group, identification of performance dimensions, and performance scale development.

> **Target Group Selection**

The U.S. Army Special Forces (SF) was chosen as the target group because interpersonal skills are critical for the success of special operations missions. First, SF Soldiers work in teams, often away from their chain of command. This requires skill and expertise in teamwork. In addition, many of their unconventional warfare or foreign internal defense missions require social skills such as intercultural sensitivity, the ability to build relationships, communication skills, and the ability to motivate others.

> **Performance Dimension Identification**

A fifteen-dimension model of interpersonal performance was selected as the basis of the interpersonal performance assessment system (Carpenter & Wisecarver, 2004). This model was chosen because it was specifically designed as a comprehensive model of interpersonal performance dimensions and an empirical evaluation of the model supports its validity.

➤ Performance Scale Development

An Advisory Board of SF Soldiers was created to guide the development of the interpersonal performance assessment system. Based on feedback from this group and a review of the multi-rater assessment literature, recommendations were made for a supervisor-based assessment using rating scales developed from critical incidents that occurred in the field (called "behavioral summary scales", or BSS). SF critical incidents for each of the interpersonal performance dimensions were collected and supplemented with historical critical incidents from an existing SF job analysis (Russell, Crafts, Tagliareni, McCloy, & Barkley; 1996). These were then used to develop the BSS for SF interpersonal performance scales.

Findings:

The assessment system was pilot tested with a small group of SF Soldiers stationed at Ft. Bragg, NC. Qualitative feedback from the focus groups indicated that the assessment system has face validity and that Soldiers found it easy to use. A number of recommendations were made to improve the system. One recommendation was to create separate forms on which to assess leaders and non-leaders, given that the interpersonal requirements for these positions would be different. Additional recommendations are discussed in the text of the report. Quantitative analyses of the pilot test data provided evidence for the reliability and validity of the assessment system.

Utilization of Findings:

Results of this Phase I effort produced an interpersonal performance assessment system that can be used to identify interpersonal performance deficits in individual SF Soldiers. This system can serve as a foundation for the development of training in interpersonal performance. The Phase II effort of this project would identify those aspects of interpersonal performance that are most critical for successful performance and develop a self-paced web-based or CD-based training program that can be administered by unit leaders to members of their unit.

SPECIAL FORCES INTERPERSONAL PERFORMANCE ASSESSMENT SYSTEM

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INTRODUCTION

STRATEGIC IMPORTANCE OF INTERPERSONAL SKILL

With the end of the Cold War, the U.S. Army began facing the challenge of defending the United States in a radically altered world and the adjustment of the Army to the changed world is ongoing. In the past decade the U.S. Army has faced numerous regional challenges and been involved in peacekeeping missions. The September 11th crisis has made clear the deadly threat of terrorism and the ensuing Global War on Terrorism (GWOT) has demonstrated the vital role of the U.S. in world events. The role that the U.S. Army and its Soldiers are being called upon to play in this GWOT requires an expanded skill set including interpersonal skills in addition to war fighting skills. These interpersonal skills can enable cooperation and coordination among military services, with other government agencies, and with Soldier and civilian members of other countries.

TACTICAL IMPORTANCE OF INTERPERSONAL SKILL

The criticality of interpersonal skill was described in the 30 January 2003 Force Operating Capabilities (FOC) document (TRADOC Pamphlet 525-66): "First and foremost…leaders must excel in the human dimension of leadership. They must possess both the ability to build cohesive teams rapidly, and the essential interpersonal skills needed to communicate and work effectively with diverse groups of people, ranging from joint, coalition, and interagency personnel, U.S. and foreign civilians, to the media."

PURPOSE AND OBJECTIVES OF CURRENT RESEARCH

The purpose of Phase I of this Small Business Innovative Research (SBIR) grant is to begin the process of developing an interpersonal performance assessment and development program that can help meet the Army's need to ensure its Soldiers are skilled in critical interpersonal behaviors.

Phase I of this process involves developing an interpersonal performance assessment system by meeting the following objectives:

➢ choosing a target group for which an assessment and development program will be developed,
➢ identifying those aspects of interpersonal performance that are necessary for successful performance for the target group,
➢ developing a system and standards for assessing interpersonal performance, and
➢ evaluating the interpersonal performance assessment system.

Special Forces (SF) was chosen as the target group based on the following criteria:

1. Need for interpersonal skill for successful performance of job
2. Lack of existing interpersonal skill training options

NEED FOR INTERPERSONAL SKILL IN SPECIAL FORCES

In response to the GWOT and during the wars in Afghanistan and Iraq, the importance of special operations for national security has clearly been demonstrated. There are a number of aspects of the Special Forces job that require interpersonally-based skills, including the need for teamwork, diplomacy, and skill in training others (e.g., see Carpenter and Wisecarver, 2004).

- ➤ Teamwork: SF Soldiers work in teams, often away from their chain of command requiring expertise in teamwork.
- ➤ Diplomacy: SF Soldiers serve as diplomats and provide humanitarian assistance.
- ➤ Training: SF Soldiers work closely with people from other countries to train indigenous forces and assist host nation forces.

Mission accomplishment requires social skills such as intercultural sensitivity, the ability to build relationships, skill in communication, and the ability to motivate others.

The criticality of interpersonal skill for successful performance in SF was confirmed by feedback from an Advisory Board that was convened to provide guidance and oversight of this project. (Additional details on the composition and role of the Advisory Board will be described in a later section.)

LACK OF EXISTING INTERPERSONAL SKILL TRAINING OPTIONS

Despite the importance of interpersonal skills, SF lacks a system for identifying interpersonal performance deficits and has few if any available training interventions. This observation was also confirmed by the Advisory Board. Informal feedback on interpersonal skills is given by team leaders, suggesting that SF Soldiers would be receptive to interpersonal skill training.

BENEFITS OF INTERPERSONAL SKILL ASSESSMENT AND TRAINING

A structured training program would:
- ➤ Assist leaders by removing some of the burden of skill development from them.
- ➤ Provide a common framework for identifying and providing feedback on interpersonal skills.
- ➤ Ensure that SF interpersonal skill assessment and development is comprehensive.

EXISTING PERFORMANCE MODELS

The first step in accurately assessing interpersonal performance was to identify relevant interpersonal performance dimensions. These dimensions should comprehensively represent aspects of job performance that are interpersonal in nature. Several job performance models exist in the applied psychology literature (e.g. Campbell et al., 1993; Borman & Motowidlo, 1993). The Campbell et al. (1993) and Borman and Motowidlo (1993) models were developed as comprehensive models of job performance that capture those elements of performance that are important for all jobs. Because of their breadth, these models do not capture interpersonal performance with the precision required to design a valid interpersonal performance assessment system. Aspects of interpersonal performance are described in the Campbell et al. (1993) and Borman and Motowidlo (1993) models in conjunction with other elements of performance providing a concise summary of overall job performance, but not a comprehensive model of interpersonal performance with discrete, measurable dimensions. For example, the leadership/supervision dimension of the Campbell et al. (1993) model includes several aspects of interpersonal performance such as coaching, modeling, and providing reinforcement. While potentially related, how well a Soldier coaches other Soldiers may differ from how well that Soldier models appropriate behaviors. Thus a model of interpersonal behaviors was needed that independently captures each aspect of interpersonal performance relevant for SF performance.

INTERPERSONAL PERFORMANCE MODEL

An interpersonal performance model with four general dimensions and 16 sub-dimensions was developed through research at the U.S. Army Research Institute for the Behavioral and Social Sciences (ARI) (Carpenter & Wisecarver, 2004). Support for the model was gathered from a critical incident sort of over 1,000 critical incidents and from survey data collected from individuals representing 81 different jobs. Confirmatory factor analysis results including parameter estimates, fit indices, and the testing of alternative models support the model's validity.

Each of the 16 interpersonal performance dimensions identified in the initial research was identified as important for SF with the exception of one, labeled Formal Staffing. Because Formal Staffing is largely a centralized function for SF, it was excluded. The four general interpersonal performance dimensions and 15 sub-dimensions used to develop the interpersonal performance assessment for SF are shown in Table 1.

Table 1: Interpersonal Performance Categories and Dimensions

Energizing Others
Influencing Others means impacting an individual or group to engage in a desired action. It can include using persuasion, rationale arguments, appealing to someone's interests, and other methods of impacting the actions of others.
Rewarding means providing praise, appreciation, or tangible rewards for effective performance, significant achievements, special contributions, or demonstrated competence.

Directing Others
Coordinating means organizing the actions of others so that they function in a smooth concerted way. It can include orienting others to what is happening and structuring work so activities are smoothly accomplished.
Training and developing means promoting the growth of, fostering the potential of, or developing the skills, concepts, or attitudes of others that result in improved performance. This includes training and developing both other SF Soldier as well as Soldiers from other countries.
Managing Perceptions means directing and influencing the observations and awareness of others. It can include promoting the image of the Army and SF, conducting promotional activities, and communicating about the nature of one's self or unit to others.
Managing Others Relationships means sustaining and/or improving the relationships among Soldiers, team members, subordinates, Soldiers in other units, host nation forces, and other personnel relevant for mission accomplishment. It can include maintaining group cohesiveness, managing differences among people, maintaining communication among others, team building, and facilitating interactions.
Establishing and Maintaining Control is defined as regulating the activities of others. It includes actions such as enforcing rules and procedures, maintaining discipline, advising, monitoring performance, setting performance standards, and establishing reporting systems.
Role Modeling means modeling desired behavior. It includes anytime a Soldier provides an example for others to follow.
Managing Personnel refers to those activities involving linking Soldiers with job demands. These activities are not part of the formal staffing system and can include recruiting Soldiers to help with a task, knowing who to ask to be a member of team, and delegating tasks.

Table 1, cont.

Exchanging Information
Informing means communicating to others knowledge needed to do their work and refraining from communicating unnecessary/irrelevant information. Informing can include providing oral and written information, responding to information requests, and editing information appropriately for the person receiving it.
Gathering Information means accumulating information that one's self, team, unit or organization needs and disregarding unnecessary/irrelevant information.

Building Relationships
Courtesy means being considerate and cooperative in one's interactions with others. It includes being friendly and considerate, getting along with others, being understanding, and being socially aware.
Helping Others means giving assistance and support to others. It can include expressing support, doing favors, and providing assistance.
Networking/Maintaining Connections means seeking out and encouraging interaction with others. It includes establishing and maintaining an interconnected group of contacts relevant for mission accomplishment, as well as, valuing and appreciating others.
Adapting to the Social Environment is defined as adjusting one's actions to fit the social environment. It refers to instances when Soldiers need to alter the way they interact with others based on the situation.

DEVELOPING STANDARDS
FOR ASSESSING INTERPERSONAL PERFORMANCE

EVALUATING INTERPERSONAL SKILLS

Interpersonal skills are highly relevant to success in many jobs in the Army, including leadership positions, although some Soldiers may view these skills as less relevant to their job than other technical or tactical skills. To emphasize the importance of interpersonal performance behaviors and maximize rating accuracy, the rating system being developed identifies the behaviors Soldiers will be assessing as closely as possible.

Behaviorally anchored rating scales (BARS) are graphic rating scales that have specific behavioral descriptions associated with various points along the rating scale (Bernardin & Beatty, 1984). The specificity of the behavioral descriptions in the BARS rating format, however, can create difficulties for raters if the behavioral descriptions do not match a ratee's behavior. It is often difficult for raters to select a rating in these cases. For this reason, an adaptation of BARS, behavioral summary scales (BSS) were developed for each of the four general interpersonal performance dimensions and 15 sub-dimensions (Pulakos, 1997).

BEHAVIORAL SUMMARY SCALES

BSS, like BARS, are anchored with behavioral descriptions, but these descriptions are summaries of behaviors written to represent a wider range of behaviors.

The development of BSS involves the following steps:

1. Collect critical incidents
2. Categorize critical incidents into performance dimensions
3. Rate critical incidents for effectiveness
4. Write behavioral summary statements that capture the content of behavioral incidents in each dimension at each effectiveness level

Critical incidents from two sources were used to create the BSS:

1. Critical incidents collected as part of the SF job analysis (Russell et al., 1996).
2. Critical incidents collected as part of this research effort (labeled 'SBIR' critical incidents).

The following sections will describe the collection, categorization, and rating of critical incidents taken from each of these sources.

SF JOB ANALYSIS CRITICAL INCIDENTS

Critical Incident Collection

> **Collection.** The job analysis critical incidents were collected in a series of 25 day-long workshops conducted at Ft. Bragg, NC by research psychologists.
> **Sample.** Participants were 175 non-commissioned officers and officers from across SF specialty areas including team commanders, weapons specialists, engineers, medics, and communications specialists. On average workshop participants were 33 years old, had been in the Army 13 years, and had been in SF for 8 years.
> **Identification of interpersonal incidents.** Each participant provided approximately 10 critical incidents resulting in 1,186 critical incidents. The critical incidents generated in the job analysis were examined to identify dimensions of interpersonal job performance (Carpenter & Wisecarver, 2004). As a result of this process 395 SF interpersonal performance critical incidents were identified.

Critical Incident Categorization

The next step in the BSS process was to check that the critical incidents were representative of the performance dimension for which they were written.

The 1,186 SF critical incidents generated in the job analysis had been sorted into dimensions of interpersonal job performance in previous research (see Carpenter & Wisecarver, 2004). Data were collected from SF Soldiers to provide additional evidence for this categorization.

> **Data Collection Strategy.** Again an electronic data collection was developed to minimize the burden on Soldier time. Participants were asked if a critical incident belonged in the interpersonal performance category in which it had been placed. If a Soldier disagreed with the proposed category, he was asked to identify a more appropriate category.

> **Categorization Forms.** Fourteen electronic critical incident categorization forms were created. Each of the 395 critical incidents appeared on one of the 14 forms (each form has about 25-30 critical incidents).

> **Sample.** It was intended that two AC or retired SF Soldiers would complete each form, for a total of 28 Soldiers who were requested to participate. Only 16 Soldiers however, were available to participate in the categorization. Their ranks were as follows: 2 retired SF, 6 MSG/1SG, 4 SFC, 3 Warrant Officers, 1 Major. This resulted in 69% (274) of the 395 critical incidents being categorized by at least one of the 16 participants, with 31% (121) not categorized by any participants; that is, several of the forms were not completed by any Soldiers, so these incidents were never categorized.

> **Results.** The results of the critical incident categorization are summarized below.
> - **Category Supported**: If there was only one rater for an incident and that rater agreed with the categorization, this was considered support for the category. If two raters were available for the incident and both agreed with the categorization, this was also considered support for the category. Results indicated support for 116 of the critical incidents.
> - **Mixed Results**: If two raters were available for an incident and one agreed with the category and the other disagreed with the category, this was considered a 'mixed result.' Responses for 44 critical incidents were mixed.
> - **Category not Supported**: If there was only one rater for an incident and he disagreed with the categorization, this was considered to be 'not supported.' If there were two raters available and they both disagreed with the categorization, this was also considered as 'not supported.' Responses for 114 critical incidents indicated the original category was not supported.

For most but not all of the cases in which the rater disagreed with the category, the rater provided an alternate suggestion for an appropriate category. Alternate categories were suggested for 146 of the critical incidents and they were categorized as such. The intention was to primarily use critical incidents for the rating scales that received a high level of agreement in this task. The 121 incidents that were not categorized by a rater were not used in the development of the rating scales.

Effectiveness Ratings

Critical incidents collected as part of the job analysis were rated on a 7-point effectiveness scale by multiple raters. The mean level of effectiveness and standard deviations were calculated for

these and were used to guide the selection of incidents for each category (see Russell et al., 1996 for additional details).

SBIR CRITICAL INCIDENTS

The previous section described critical incidents from the SF job analysis (Russell et al., 1996) that were used to create the BSS. This section describes critical incidents collected as part of this research effort that were used to create the BSS. Again, we first describe the collection of the critical incidents, then their categorization, and finally the ratings that were collected using these incidents.

Critical Incident Collection

> **Collection.** Additional incidents of interpersonal performance were collected as part of this SBIR. The objective in collecting the critical incidents was to meet data requirements, while minimizing the time required from Soldiers. To meet this goal, electronic critical incident collection forms were developed to allow participants to provide critical incidents as their schedule permitted.

> **Sample.** Fourteen Active Component (AC) SF Soldiers provided a total of 45 critical incidents. The sample is described below. Note that values do not sum to 14 because some participants did not provide demographic data. Note that all Soldiers were male, due to the fact that all SF Soldiers are male.
>   - Rank: 4 Master Sergeants (MSG), 5 Sergeants First Class (SFC), 1 Sergeant Major (SGM), 2 Warrant Officers, 1 Officer[1]
>   - MOS: 1 18A (Team leader), 2 180A (Assistant Team Leader/Team Leader), 1 18D (Medical Sergeant), 2 18F (Intelligence Sergeant), 2 18E (Communications Sergeant), 4 18Z (Team Sergeant)
>   - Years in SF: 5 had between 10 and 15 years, 8 had more than 15 years

Critical Incident Categorization

The next step in the BSS process was to check that the critical incidents were representative of the performance dimension for which they were written.

The 45 critical incidents obtained in the 2003 data collection were requested by category; Soldiers were asked to provide examples of specific interpersonal performance dimensions and the category they specified was used. Appendix A shows the distribution of data collection forms for each performance dimension. As seen in Appendix A, more data collection forms were distributed for certain dimensions. We distributed more forms for those dimensions for which we had fewer critical incidents from the 1996 job analysis (see Carpenter and Wisecarver, 2004).

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[1] The rank of this individual was not recorded.

While an additional re-categorization of these 45 critical incidents by a new rater would have been preferable, time constraints and limited Soldier availability made this infeasible.

The following is an example of the critical incidents that were collected:

During a mission an SF team was having difficulty keeping the host nation troops motivated late in the afternoon. Training a certain number of hours each day would determine if all the objectives could be met for the final field exercise. The Senior Weapons Sergeant had brought some items with him on the deployment that he could use as rewards for outstanding performance. He set up the training in the last week to use competition events to motivate troops to meet the training goals. The troops desire[2] to be the best kept their motivation up and ensured the training goals were met.

Effectiveness Ratings

Participants in the 2003 data collection specified whether the critical incident they provided was an example of effective or ineffective performance. This dichotomous indication was used to apply the incidents to the rating scales.

BEHAVIORAL SUMMARY SCALES

The following steps were taken to create the BSS.

- ➢ Categorization and effectiveness data from the job analysis and 2003 data collection were assembled in a database.
- ➢ Behavioral summary statements were written to capture the content of the behaviors for each interpersonal performance dimension. The summary statements were written for low, average, and high levels of effectiveness.
- ➢ Critical incidents in which multiple raters agreed with the categorization were given greater weight in writing summary statements.
- ➢ Summary statements were written at three effectiveness levels for the four general interpersonal performance dimensions and 15 sub-dimensions for a total of 57 scale anchors.
- ➢ The scales were assembled in a rating form for focus group testing.
- ➢ Five-point rating scales were used with behaviors summaries at three of the points: Needs much improvement, Adequate, and Outstanding. Intermediate anchors were labeled: Needs some improvement and More than adequate.
- ➢ The overall effectiveness rating, developed as part of the job analysis, was also included on the rating form.

The rating form is in Appendix B. The pilot test of the assessment and results are described in the section of this report entitled, "Evaluating the Interpersonal Performance Assessment System."

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[2] Note that, while grammatically incorrect, this phraseology was maintained in the data collection products because it is a common use of the term within this community and would be easily understood by participants.

ROLE OF ADVISORY BOARD

An Advisory Board was convened to provide review and oversight of project goals and materials. The Advisory Board consisted of four active component (AC) SF Soldiers and the US Army John F. Kennedy Special Warfare Center and School (JFK SWCS) Behavioral Science Coordinator. The AC Board members were all Warrant Officers or senior NCOs (Master Sergeants or Sergeants First Class) and all had at 10 years or more experience in SF.) The Advisory Board met on 27 May and 28 July 2003 for two hours each session. At the 27 May 2003 meeting the goals of the project were explained including the Phase I and Phase II objectives. Then feedback about project objectives was solicited.

ADVISORY BOARD FEEDBACK

The Advisory Board was asked a series of questions and these questions and their responses are summarized below. See Appendix C for a more detailed listing of their comments.

> **Do you view interpersonal skills as important in SF?**
Advisory Board members indicated that interpersonal skills are important and that most SF Soldiers think interpersonal skills are crucial for mission success.

> **Are you aware of any formal training that exists for SF in the area of interpersonal skills?**
The Advisory Board members were unaware of formal training available to SF Soldiers to improve interpersonal skills.

> **Is informal feedback about interpersonal skills given? Is the feedback helpful?**
The Advisory Board members stated that informal interpersonal skill feedback was provided to team members by team leaders and that SF Soldiers were comfortable receiving feedback from their commanders.

> **If effective training was available, would Soldiers use it?**
Advisory Board members indicated that if effective interpersonal training was available, Soldiers would be willing to commit a fair amount of time to interpersonal skill development (up to several days at once).

> **Do Soldiers accept peer feedback?**
Input about the occurrence and acceptability of peer feedback was mixed; some felt that peer feedback was not uncommon and that Soldiers would be comfortable receiving peer feedback, others did not.

> **Are interpersonal requirements different when deployed?**
Advisory Board members indicated that while required interpersonal behaviors differed when deployed (in contrast to during training or when executing support assignments), the necessary underlying skills remained constant.

When asked specifically about the kind of interpersonal skill development tools would be useful, three types of interventions were mentioned.

> **Knowledge sharing**
  - Database of past interpersonal situations with a description of effective and ineffective actions
  - Organized by mission
  - Online
  - Soldiers would be able to post to database on an ongoing basis

> **Pre-deployment planning**
  - Knowledge sharing database (above)
  - Mission based role-playing exercises based on scenarios in database
> **Individual training**
  - Assessment of deficits in people skills by commander
  - Face-to-face feedback from commander based on assessment
  - Individual training in deficit areas that reviews the basic concepts for each dimension.
  - Ongoing assessment and feedback from commander (and possibly team)

At the second meeting, the Advisory Board provided feedback on the interpersonal performance assessment system. The protocol for the focus group feedback was used and the Advisory Board feedback on the assessment system is reported with the focus group feedback (see Task 5 section of this report).

DEVELOPING A SYSTEM
FOR ASSESSING INTERPERSONAL PERFORMANCE

Performance appraisal is a fundamental element of success in many organizations. A successful performance appraisal can help to align Soldiers with team, SF, and Army goals creating a unified, goal-driven, and focused military. Successful performance appraisal can reinforce the importance of core SF competencies and serve as a motivational tool for developing those competencies. Federal Management Partners (FMP) reviewed the multi-rater assessment literature and solicited feedback from SF Soldiers to make a recommendation about which Soldiers (e.g. peers, supervisors, subordinates) or what combination of Soldiers should provide interpersonal performance assessments. When deciding on a performance appraisal rating strategy there are several important factors:

Performance Appraisal: Factors to Consider
• What is the culture of the organization?
• What type of performance is being evaluated?
• Who has knowledge of performance?

The Army is a specialized organization with a strong culture based on a hierarchical system that creates a large power distance. Although this hierarchy is less notable on an SF team than in regular Army units, it still exerts a strong presence. Additionally, the complexity of interpersonal performance makes it challenging to assess. Both Army culture and the uniqueness of interpersonal performance will influence the effectiveness of evaluators. After considering these components, we make the following recommendations:

> Initially, direct supervisors should be the prominent source of information in interpersonal performance appraisals.
> Ultimately, it would be beneficial to incorporate peer evaluations when conducting interpersonal performance appraisals.

ARMY CULTURE

It is important to consider the special conditions of performance appraisal in the Army. When discussing performance appraisal in the Army, it is important to note the *large power distance*. Large power distance occurs when power is unequally distributed, and subordinates and supervisors are aware that they are unequal (Fletcher & Perry, 2001). When conducting performance appraisals in a large power distance organization it is important to closely follow the natural pattern of power and authority in the organization.

Large Power Distance Organizations: Factors to Consider
Closely follow the natural pattern of power and authority in the organization. Therefore, in the Army: ▪ Make certain that the appraisal process is initiated by the supervisor. ▪ Ensure that the supervisor acts in a directive manner.

It is important to ensure that the organization's norms of authority are maintained. Norm maintenance prevents the undermining of supervisors' authority and provides a stable and predictable environment. In large power distance organizations, such as the Army, it is especially important to maintain norms of authority. This is achieved by ensuring that supervisors conduct performance appraisals. In large power distance organizations, employees depend on their supervisors and expect to be evaluated by an individual who holds a position of power.

SUPERVISOR AS EVALUATOR

In any performance appraisal context it is imperative to obtain information from a qualified and knowledgeable source. In order to make appropriate judgments and provide high quality feedback the source must be knowledgeable of the job and the job requirements. The immediate supervisor is generally considered to hold this "expert power" (Murphy & Cleveland, 1995), and is the most common source of performance appraisal information in organizations (Long, 1986; Cleveland, Murphy, & Williams, 1989; Murphy & Cleveland, 1995). Not only are supervisors

believed to hold "expert power," they are also the source most strongly favored by ratees (Bernadin & Beatty, 1984).

> Supervisor as main source of performance information:
> ➤ Qualified and knowledgeable source.
> ➤ "Expert" in terms of the job and job requirements.
> ➤ Most commonly used source of information.
> ➤ Most strongly favored by employees.

Consistent with the large power distance in the Army, focus groups of SF personnel (27 May & 28 July 2003), recommended that commanders would be the most appropriate raters for SF. The focus groups indicated that SF Soldiers routinely receive feedback from their commanders and are comfortable with and see the value of commander-based feedback.

PEER ASSESSMENT

When designing a performance appraisal system, it is also important to consider the type of performance that will be evaluated. While supervisors are a good source of information when conducting performance appraisals, other team members have valuable perspectives. There may be specific issues to consider when appraising *interpersonal* performance.

Interpersonal Performance Appraisal: Factors to Consider
• Who directly *observes* interpersonal performance?
• Who has *insight* into interpersonal performance?

First, with respect to who observes interpersonal performance, peers often have more frequent access to this information (Murphy & Cleveland, 1995). Peers may also provide more valid assessments of interpersonal performance because of their capability to employ social comparisons (Zazanis, Zaccaro, & Kilcullen, 2001). In addition, the presence of peers is less likely to alter an individual's behavior than the presence of a supervisor. While supervisors can make an educated guess concerning an individual's interpersonal performance, peers often experience the reality. This may be somewhat less true for an SF team; given that they spend such a great deal of time together, true behaviors are more likely to be observed by both peers and supervisors. Secondly, peers may be more in tune with their colleagues' interpersonal performance, as research has demonstrated that they take note of unique interpersonal behaviors when assessing overall performance (Zazanis, et al., 2001).

Therefore, peers may be an important source of information concerning interpersonal performance for the following reasons:

> ➤ Peers have more frequent access to interpersonal performance information.
> ➤ Peers may provide more valid assessments because their presence does not affect performance and because of their ability to make social comparisons.
> ➤ Peers may have more insight to unique aspects of interpersonal performance.
> ➤ Employees generally perceive performance appraisal information from multiple raters (e.g. supervisors and peers) to be less biased (McEvoy, 1990).

However, there are disadvantages to obtaining performance information from multiple sources. First, resource costs would be higher. Performance appraisal can be a time-consuming process and peer ratings add to the amount of time needed. Second, the benefit of peer assessments must be viewed in the specific context of Army culture. When viewed in the context of the Army, peer assessments may be less successful.

Peer Assessment in the Army: Factors to Consider (Murphy & Cleveland, 1995)
• Peer raters may provide increased access to interpersonal performance information, but it does not guarantee more accurate information.
• Peer ratings are not a natural fit within the framework of a hierarchical organization – only leaders are perceived as qualified to evaluate performance.
• Disruptions in the power hierarchy can create political difficulties within the organization affecting interactions between peers, supervisors, and subordinates.

RECOMMENDATION

There are benefits of including peer assessments. However, due to limitations posed by the large power distance and resultant organizational culture, it is recommended that initial interpersonal performance appraisal systems employ supervisor assessments only. In teams where commander-based interpersonal evaluation has been successful, Soldiers may see the value of peer-based interpersonal feedback. Therefore, once commander-based interpersonal evaluations have been successful, the incorporation of peer assessments may lead to additional performance improvement.

EVALUATING THE INTERPERSONAL ASSESSMENT SYSTEM

Focus groups were conducted to provide both quantitative and qualitative evaluations of the interpersonal performance assessment.

> **Quantitative evaluation**: A pilot test of the assessment was conducted to assess the psychometric properties of the instrument.
> **Qualitative evaluation**: Group interviews were conducted to gather Soldier input.

SAMPLE

Facilities. The focus groups were held at JFK SWCS at Ft. Bragg on 28 July 2003 in a room with conference-style seating. Two 2-hour sessions were held.

Session. Participants were asked to complete the people skill assessment form for an anonymous peer or subordinate and then give feedback on the assessment including form readability, time required, structure of the form, and utility of the assessment.

Sample. Eleven Soldiers participated in the first session and four Soldiers participated in the second session. The four Soldiers in the second session participated in the Advisory Board meeting on 27 May 2003. An additional interview on 29 July 2003 with a single participant who did not attend either focus group was also conducted. Participant ranks are reported in Table 2.

Table 2. Focus Group Participants

Rank	Frequency	Percent
SFC	3	18.8
MSG/1SG	5	31.3
Warrant Officer	2	12.5
Officer	6	37.5
Total	16	100.0

Session Introduction. Participants were told that the purpose of the session was to gather feedback on a set of assessment scales designed to measure people skills in SF and that the project was being conducted as part of a Department of Defense research grant managed by the U.S. Army Research Institute. They were also told that the comments and feedback collected would be recorded anonymously, that specific comments would not be attributed to specific individuals, and that all information would be reported and analyzed in aggregate form. After the introduction, each participant read and signed an informed consent. The informed consent form described the purpose of the research, and stated that participation was voluntary and they could withdraw from the session at any time. See Appendix D for the informed consent document and Appendix E for the full focus group protocol.

QUANTITATIVE EVALUATION

After completing the informed consent, focus group participants were asked to select an anonymous ratee of their rank or lower whom they had worked with extensively for at least one year. When completing the assessment, participants were asked to consider the actions of the ratee only in the last year. Participants were *not* asked to identify the ratee.

The assessment forms were used to assess the psychometric and statistical properties of the ratings. The following calculations were performed:
> Means and standard deviations were calculated to check the rating distributions for appropriate elevation and variance.
> Internal consistency measures were calculated for the subscales within each of the four broad scales to assess scale reliability.
> Pearson product moment correlations were calculated for the 15 subscales and four general scales. The 15 subscales and four general scales were also correlated with the overall effectiveness rating.

> Overall effectiveness was regressed onto the 15 subscales, and onto the four broad scales to estimate the amount of variance accounted for in overall effectiveness by interpersonal skills.

Descriptive Statistics.

The assessment was completed for ratees in a range of ranks from Staff Sergeant to Officer (see Table 3).

Table 3. Ratee Rank

Rank	Frequency	Percent
SSG	1	6.3
SFC	8	50.0
MSG/1SG	3	18.8
Warrant Officer	1	6.3
Officer	3	18.8
Total	16	100.0

Raters reported having worked with their selected ratee from between one and two years, to more than 10 years (See Table 4). The majority of participants had worked with their selected ratee between one and two years.

Table 4. Amount of Time Raters Worked with Ratees

Number of Years	Frequency	Percent
1-2 years	9	56.3
2-3 years	6	37.5
5-10 years	1	6.3
Total	16	100.0

Means and standard deviations for each general interpersonal performance scale and the subscales, as well as overall effectiveness are found in Appendix F. Possible scale scores ranged from 1 for 'Needs much improvement' to 5 for 'Outstanding.'

> General scales: Means range from 3.4 to 3.6
> Subscales: Means range from 3.1 to 3.7
> Overall effectiveness: Mean is 3.6

Standard deviations for the 20 scales ranged from .8 to 1.3, demonstrating scale variability and indicating that raters used the entire range of scale anchors.

Correlations.

While the sample size is too small to provide a high degree of power, some analyses were conducted to obtain preliminary results. The low level of power available will primarily function to decrease the likelihood of finding significant relationships. Correlations among the interpersonal performance subscales were generally high and ranged from .12 to .87 (see Table 5). Despite the small sample size, many of the correlations were statistically significant. Correlations between the overall effectiveness ratings and the interpersonal performance subscales were also generally quite high. Interestingly, the correlation between demonstrating courtesy and overall effectiveness was low (.23) and not significant, which is somewhat unexpected given that SF Soldiers are required to interact with and build relationships with host nation personnel. The word 'courtesy' may not have an entirely positive connotation within the military. Re-labeling this dimension "Demonstrating Respect" may more effectively communicate to raters the meaning of the dimension.

Similarly to the subscales, correlations among the general interpersonal performance dimensions and between the general interpersonal performance dimensions and general effectiveness were high (see Table 6).

Reliability.

Internal consistency of the subscales within the four general dimensions was assessed. Building and Maintaining Relationships and Directing Others have multiple subscales and alpha was calculated using their subscales as a measure of internal consistency. Alphas for both dimensions were high.

> ➤ Building and Maintaining Relationships: Demonstrating Courtesy, Helping Others, Networking/Maintaining Connections, and Adapting to the Social Environment
> **Alpha = .77**

> ➤ Directing Others: Coordinating, Training and Developing, Managing Perceptions, Managing Others' Relationships, Establishing and Maintaining Control, and Managing Personnel
> **Alpha = .84**

Energizing Others and Exchanging Information each have two subscales. For these dimensions, the bivariate correlation between the subscales was used as an index of internal consistency.

> ➤ Energizing Others: Rewarding Others and Influencing Others
> **r = .72**

> ➤ Exchanging Information: Informing Others and Gathering Information
> **r = .73**

Table 5. Correlations for Interpersonal Performance Subscales and Overall Effectiveness

	1	2.	3.	4.	5.	6.	7.	8.	9.	10.	11.	12.	13.	14.	15.
1. Rewarding Others															
2. Influencing Others	.716**														
3. Coordinating	.687**	.680**													
4. Training and Developing	.533*	.498*	.634**												
5. Managing Perceptions	.730**	.608*	.563*	.558*											
6. Managing Others Relationships	.537*	.350	.678**	.652**	.641**										
7. Establishing and Maintaining Control	.453	.294	.465	.486	.540*	.669**									
8. Role Modeling	.727**	.484	.444	.542*	.864**	.549*	.218								
9. Managing Personnel	.423	.469	.509*	.647**	.599*	.343	.221	.539*							
10. Informing	.511*	.117	.370	.632**	.477	.339	.359	.548*	.662**						
11. Gathering Information	.542*	.349	.495	.590*	.445	.479	.609*	.517*	.425	.725**					
12. Demonstrating Courtesy	.398	.259	.175	.315	.475	.361	.496	.420	.314	.251	.476				
13. Helping Others	.471	.145	.289	.145	.614*	.368	.310	.587*	-.010	.330	.389	.198			
14. Networking/Maintaining Connections	.392	.278	.421	.483	.490	.498*	.263	.486	.301	.410	.603*	.575*	.465		
15. Adapting to the Social Environment	.488	.260	.410	.558*	.625**	.666**	.629**	.471	.429	.559*	.585*	.673**	.270	.556*	
16. Overall Effectiveness	.813**	.628**	.561*	.502*	.690**	.568*	.479	.766**	.329	.498*	.669**	.230	.589*	.392	.430

** Correlation is significant at the 0.01 level (2-tailed).

* Correlation is significant at the 0.05 level (2-tailed).

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Table 6. Correlations of General Interpersonal Performance Scales and Overall Effectiveness

	Energizing Others	Directing Others	Exchanging Information	Building and Maintaining Relationships
Directing Others	.430			
Exchanging Information	.557*	.792**		
Building and Maintaining Relationships	.690**	.663**	.720**	
Overall Effectiveness	.657**	.717**	.723**	.840**

* *Correlation is significant at the 0.05 level (2-tailed).*
** *Correlation is significant at the 0.01 level (2-tailed).*

The magnitude of the internal consistency measures indicates that the subscales within each general dimension were rated similarly by focus groups participants, providing support for the interpersonal performance model. A replication of these correlations as well as confirmatory factor analysis with a larger sample could be used as a further test of the validity of the interpersonal performance model.

Conducting regression analyses would enable us to assess the variance accounted for in overall effectiveness by the interpersonal performance dimensions. The small sample that is available for these analyses, however, provides insufficient power and would preclude any conclusions. An example of the analyses that could be completed with a greater sample size can be seen in Appendix G.

QUALITATIVE EVALUATION

Two individuals were involved in conducting each focus group, a facilitator and a recorder. The facilitator focused on engaging the attention and interest of participants, and asking specific questions about the assessment form. Activities the facilitator performed included:

> ➢ restating and summarizing comments,
> ➢ scanning to see which topics had been discussed and which had not,
> ➢ keeping track of time to determine when to end each session,
> ➢ tracking non-verbal cues, and
> ➢ ensuring all participants had an opportunity to state their opinions.

The recorder captured the comments provided by focus group members. Comments were captured in paraphrase fashion on a laptop computer.

Following is a summary of comments made during the focus groups. For a more detailed description see Appendix H. Recommendations for incorporating focus group feedback are included below.

General Reactions.

Reactions to the interpersonal skill assessment included both positive and negative statements. Some participants indicated that the assessment provided a useful tool to frame feedback on interpersonal skills and would help facilitate a dialogue with the Soldier receiving the feedback. In addition, multiple Soldiers suggested that by adding fields for comments, the form could be used to record and track a subordinate's interpersonal performance over time. Others felt that team leaders were already able to identify interpersonal skill deficits and expressed concern that the assessment would become an additional piece of required paperwork. Some of this concern seemed to be the result of a fundamental assumption that interpersonal skills could not be trained and therefore any developmental effort would waste resources.

> ➢ Recommendation: Successful implementation of an interpersonal skill assessment and training system would require that Soldier concerns about the trainability of interpersonal skills be addressed.

Time Requirements.

Soldiers also expressed concern that they did not have the time to invest in developing interpersonal skills in others. Several Soldiers stated that interpersonal assessment and development should be voluntary. Others stated that time requirements should be minimal. Support was expressed for an interpersonal skill 'contact team' that could provide interpersonal skill assessment and development when a commander felt it was needed.

> ➢ Recommendation: Successful implementation of an interpersonal skill assessment and training system would require that time requirements for commanders be as minimal as possible and that participation in the system clearly result in performance gains.

Supervisor-based Assessment.

Supervisor-based assessment was preferred by focus group participants. Participants acknowledged that peer assessments may be beneficial, but were unsure how they would be received by ratees.

> ➢ Recommendation: Supervisors should be the primary assessors, with consideration given to incorporating peer evaluations once system is successfully implemented.

Timing of Assessment and Development.

Feedback was gathered about when interpersonal skill assessment and development should occur. Several Soldiers indicated that SFAS would be the most appropriate time for interpersonal skill assessment and development. It was suggested that because SFAS participants are younger, they may be more receptive to interpersonal feedback. Other Soldiers suggested that interpersonal assessment and development would be useful at multiple points including as part of pre-deployment planning, while deployed, and during the training cycle.

> ➤ Recommendation: Interpersonal skill assessment and development would be useful both during selection and after Soldiers are in the field. However, the tools used would need to reflect the different requirements of Soldiers. For example, tools used for Soldiers with field experience may be most useful if they are tailored to reflect interpersonal requirements in specific host nations.

Format of Assessment.

Participants were also asked about ease-of-use, accuracy, and comprehensiveness of the interpersonal skill assessment form. Soldiers were positive about the length of the form, indicating that the amount of time required to complete the assessment was appropriate. Several Soldiers indicated that it would be useful to be able to write in comments on the form. It was also suggested that two forms would be useful: one for leaders and one for non-leaders. Soldiers recommended that wording of the scale anchors 'adequate' and 'more than adequate' be changed to sound more positive.

> ➤ Recommendations: Include space for written comments on form, reword scale anchors 'adequate' and 'more than adequate', and create a leader and non-leader version of the form. The form was modified to incorporate these recommendations (see Appendices H and I). Space for written comments was included after each scale. Scale anchors 'adequate' and 'more than adequate' were changed to 'good' and 'very good'.[3] Scales with significantly less importance for Soldiers at lower rank (Carpenter & Wisecarver, 2004) were removed from the non-leader version.

CONCLUSIONS

> ➤ **Need for Interpersonal Skill Assessment**

This Phase I SBIR provides an interpersonal skill assessment system that can be used as the basis for developing and implementing an interpersonal skill training system in SF. Using this system, Soldier deficiencies in interpersonal skills can be accurately assessed so targeted training can be provided.

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[3] It should be noted that changes made to the scale anchors could potentially affect the psychometric characteristics of the scales.

> **Interpersonal Skill Assessment Development**

BSS were developed for 4 general dimensions of interpersonal performance and 15 subscales. Nearly 500 SF critical incidents were used to develop the BSS.

> **Interpersonal Skill Assessment System Evaluation**

The assessment system was pilot tested with SF Soldiers at Ft. Bragg. Primarily qualitative feedback was collected. This feedback indicated that the assessment system has face-validity and that Soldiers found it easy to use. Preliminary analyses with a sample of 16 Soldiers provided some quantitative evidence for the reliability and validity of the assessment system.

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**Appendix A
Critical Incident Collection Forms Distribution**

Critical Incident Collection Forms Distribution

Form ID	Number Distributed	Interpersonal Dimensions
A	1	Controlling Adapting
B	10	Rewarding Others Informal Staffing
C	7	Maintaining Connections Coordinating
D	7	Role Modeling Managing Others Relationships
E	5	Maintaining Connections Influencing Others
F	1	Controlling Rewarding Others
G	1	Controlling Role Modeling

32 Forms Distributed

Appendix B
Focus Group Rating Form

Special Forces People Skill Assessment

Identify a Soldier with your rank or lower that you have worked with extensively for at least 1 year. You will be assessing this Soldier's people skills.

Rank of Soldier being evaluated:	Your rank:	Amount of time you have worked with Soldier being evaluated:
O SGM/CSM O SGT/SSG O MSG/1SG O Warrant Officer O SFC O Officer	O SGM/CSM O SGT/SSG O MSG/1SG O Warrant Officer O SFC O Officer	O 1-2 years O 5-10 years O 2-3 years O More than 10 O 3-5 years years

Circle the rating that most accurately describes the selected Soldier's performance. Action summaries describe 3 performance levels: **Needs much improvement, Adequate,** and **Outstanding**. If you feel the Soldier's performance falls between these levels, circle **Needs some improvement** or **More than adequate**. A Soldier does not need to demonstrate every skill described to be rated at a given level, but should, in general, demonstrate this level of proficiency. Consider the actions of this Soldier ONLY in the last year. There are 20 ratings. Think about where the Soldier will fall on each scale, and then read through the comments in that box to make sure he fits. If he doesn't, read the comments in the other boxes and adjust your rating accordingly.

ENERGIZING OTHERS

1. How effective is this Soldier at **REWARDING OTHERS?**

Does not give credit to others for their work. Is not able to identify rewards that are motivating to others. Rewards immediately desired actions without considering long term consequences and/or rewards actions with negative consequences.

Rewards actions that help achieve the mission. Identifies what a person or group finds most rewarding. Uses a variety of strategies for reinforcing desired actions including recognizing accomplishments and tangible rewards.

Anticipates situations where rewards are needed and plans ahead to have rewards ready. Is innovative in finding ways to reinforce desired actions. In groups, knows to whom rewards should be given to get results.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

2. How effective is this Soldier at **INFLUENCING OTHERS?**

Unable to influence others. Uses influence strategies that others react to negatively. Is not successful in gaining the trust of team members, superiors, and/or Host Nation (HN) personnel.

Uses authority appropriately. Can influence others in a variety of ways such as making logical arguments, drawing on personal relationships, offering something in return, and appealing to personal interests.

Can influence others effectively in tense and high stake situations. Maintains effective performance of team under stress. Exerts influence effectively with peers, superiors, and HN personnel. Identifies key people to influence in complex situations.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

3. Overall, how effective is this Soldier at ENERGIZING OTHERS?

Unable to motivate others, including team members and Host Nation (HN) personnel, toward mission accomplishment. Does not use effective influence or reward strategies.	Successful at energizing team members and HN personnel to accomplish mission goals under most circumstances. Uses a variety of influence and reward strategies effectively.	Successful at energizing a variety of groups (including higher command) to accomplish mission goals under stress and when conflicting agendas are present. Adeptly matches influence and reward strategies to situational demands.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

DIRECTING OTHERS

4. How effective is this Soldier at COORDINATING?

Ineffective at managing Army and/or HN administrative procedures. Does not anticipate needs of command or team effectively. Does not clarify roles when working with others. Has trouble planning, organizing, and executing tasks under tight deadlines.	Comfortable interacting with HN personnel to obtain necessary resources. Successfully negotiates Army and HN administrative procedures. Helps identify clear roles for those involved when working in groups. Considers others' workload when assigning tasks.	Obtains and organizes personnel and resources to accomplish mission objectives. Effectively coordinates long rang planning efforts that involve multiple groups (e.g. SF teams, HN personnel, other US military). Increases group efficiency by clearly defining tasks.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

5. How effective is this Soldier at TRAINING AND DEVELOPING?

Does not match training techniques to learning style of trainee(s). Loses control of training environment or learner attention. Is unprepared when delivering training. Lacks knowledge of training material. Does not ensure trainee safety. Unable to obtain positive change when counseling other Soldiers.	Comfortably uses a variety of teaching techniques and matches teaching technique to learning style of trainees. Is knowledgeable of training material. Notices trainee mistakes and demonstrates correct procedures. Ensures that trainees competently execute trained tasks. Maintains a safe training environment.	Independently identifies others developmental needs and provides appropriate training and/or developmental experiences. Notices and takes advantage of opportunities to teach others as they occur. Innovatively adapts training techniques and materials to learner needs. Encourages multifunctionality among team members and provides training accordingly.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

6. How effective is this Soldier at MANAGING PERCEPTIONS?

Does not represent self or team well to higher command. Does not represent SF and/or U.S. positively to HN personnel. Does not appear trustworthy to others. Is perceived as sloppy, lazy, and/or unprepared for assigned duties.	When mistakes are made, this Soldier handles the situation in a way that builds confidence in his and/or his team's abilities. Is perceived as a team player, dependable, and trustworthy. Is professional in demeanor and in written communication. Appears competent in demanding situations.	Perceived as having important expertise and making a positive contribution at all times. Gains the trust of key personnel within and outside of SF. Is able to manage how he, his team, and SF are perceived by multiple groups with competing agendas. Creates positive impressions for media.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

7. How effective is this Soldier at MANAGING OTHERS RELATIONSHIPS?

Takes no action to stop conflict among others. Creates situations that pit people against each other. Is unaware of how his actions influence relationships among others.	Uses authority to stop conflict when appropriate. Encourages other Soldiers to build rapport with HN personnel. Understands other cultures and uses this knowledge to build rapport between SF and other groups such as HN personnel and other US military.	Anticipates potential conflict situations and prevents them from occurring. Facilitates understanding and mutual respect between individuals and groups. Builds rapport among others in tense and/or quickly developing situations.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

8. How effective is this Soldier at Establishing and Maintaining CONTROL?

Does not identify or use available resources to maintain effective performance of team members, subordinates, and/or HN personnel. Allows peers, subordinates, or HN personnel to engage in unsafe practices.	Maintains control of situations when dissent is present. Acts decisively to control situations when necessary. Effectively uses established systems to stop undesirable actions. Keeps team focused on mission.	Prevents dissent from occurring and/or transforms dissent into support. Establishes and executes plans for maintaining discipline and effective performance. Establishes and enforces consequences for undesirable actions.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

9. How effective is this Soldier at ROLE MODELING?

Does not model safe practices to SF Soldiers, other US military, and/or HN personnel. Sets poor example for other team members by complaining, being lazy, or belittling others. Holds others to higher standard of behavior than self.	Demonstrates positive attitude. Sets example by performing effectively when scared, tired, in pain, and/or under stress. Is professional in all interactions. Models safe practices for SF and HN personnel.	Takes initiative and motivates others by setting example in difficult, physically demanding, and emotionally stressful situations. Demonstrates willingness to do undesirable tasks. Sets example by going beyond what is expected.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

10. How effective is this Soldier at STAFFING?

Does not solicit or take advice from others when he should. Does not consider desires or expertise of other team members when assigning tasks or requesting help. Makes personnel changes for poor reasons and/or at inappropriate times.

Assigns tasks to those who have the expertise to effectively execute them. Uses a variety of resources to staff tasks and projects. Effectively uses established procedures to recruit necessary personnel.

Uses available personnel effectively to accomplish missions under tight deadlines, stressful and demanding situations, and when resources are limited. Balances requirements for expertise with developmental needs of personnel when delegating assignments.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

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11. Overall, how effective is this Soldier at DIRECTING OTHERS?

Is unable or unwilling to guide the actions of others toward mission accomplishment. This may include an inability or unwillingness to coordinate, train and develop others, manage perceptions, manage others relationships, establish and maintain control, role model appropriate behavior, or staff effectively.

Able and willing to guide the actions of others toward mission accomplishment in most circumstances. Shows ability to coordinate, train and develop others, manage perceptions, manage others relationships, establish and maintain control, role model appropriate behavior, and staff effectively.

Plays a pivotal role in guiding the actions of others toward mission accomplishment. Shows ability to coordinate, train and develop others, manage perceptions, manage others relationships, establish and maintain control, role model appropriate behavior, and staff effectively even under tight deadlines, in stressful and demanding situations, and when resources are limited.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

EXCHANGING INFORMATION

12. How effective is this Soldier at INFORMING?

Does not pass on information needed for effective planning or mission execution. Communicates unnecessary or irrelevant information. Does not identify and/or respond to information needs of others.

Accurately identifies information needs and concisely provides requisite information. Clearly describes procedures, objectives, and requirements to others. Is comfortable conveying information to HN personnel.

Adjusts communication style to needs of listeners. Conveys necessary information to multiple groups, including HN personnel and commanders, SF commanders, and other US military, effectively. Independently anticipates information needs and provides needed information.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

13. How effective is this Soldier at GATHERING INFORMATION?

Does not gather accurate and/or complete information. Does not take time to accumulate necessary information. Makes incorrect assumptions. Reports out-of-date information. Is not comfortable gathering information from HN personnel.

Disregards inaccurate information. Is able to learn and use other languages to gather information. Is able to gather important information in stressful and demanding situations. Keeps needed information complete and up-to-date.

Successfully uses a variety of information sources including subordinates, peers, commanders, other US military, and HN personnel. Independently anticipates information needs and gathers requisite information. Identifies and uses expert sources for gathering information.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

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14. Overall, how effective is this Soldier at EXCHANGING INFORMATION?

Shows an inability or unwillingness to communicate information effectively or gather information needed for mission accomplishment.

Contributes to mission accomplishment by gathering important information and concisely communicating that information to appropriate sources.

Independently anticipates information needs and adeptly uses a variety of sources to gather information. Uses a variety of communication techniques to inform subordinates, peers, commanders, and HN personnel.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

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BUILDING AND MAINTAINING RELATIONSHIPS

15. How effective is this Soldier at DEMONSTRATING COURTESY?

Does not respect individual differences. Is not willing to learn about or engage in HN customs. Is uncooperative, condescending, and/or insulting to others. Wastes others' time.

Acknowledges the accomplishments of others. Shows respect for the experience of others. Is tolerant of individual differences, including others' personal quirks. Is willing to learn about and take part in HN customs.

Identifies and is concerned with others' needs, even when those needs are not obvious. Listens attentively to others. Actively participates in HN customs. Expresses genuine excitement about others' accomplishments.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

16. How effective is this Soldier at HELPING OTHERS?

Puts self interest and welfare above that of team. Is unaware when HN personnel and/or team members, need assistance. Avoids opportunities to volunteer.

Notices when team members, HN personnel, and others need assistance. Effectively uses organizational resources to help others. Willing to volunteer when needed.

Devotes personal time and effort to team members and HN personnel. Helps team members overcome personal difficulties or crisis. Draws on personal resources and expertise to assist others. Seeks out opportunities to volunteer.

Needs Much Improvement	Needs Some Improvement	Adequate	More Than Adequate	Outstanding

17. How effective is this Soldier at NETWORKING/MAINTAINING CONNECTIONS?

Overlooks or avoids opportunities to build relationships, both within and outside SF. Is not willing to put forth effort to communicate with HN personnel. Is seen as unfriendly and/or distant.	Builds relationships with HN personnel, including learning and using new languages when necessary. Spends time with others including attending social events and participating in HN customs when appropriate.	Establishes and maintains contacts within and outside of SF (including HN personnel) and uses their assistance to facilitate mission accomplishment. Adeptly finds common ground with others even when commonalities are not obvious.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

18. How effective is this Soldier at ADAPTING TO THE SOCIAL ENVIRONMENT?

Is unaware of and/or unwilling to engage in HN customs. Is uncomfortable or awkward interacting with people from different backgrounds. Ignores input from experienced personnel including team members.	Accurately identifies others' needs and desires, including HN personnel, and alters actions appropriately. Interacts with others in ways with which they are comfortable. Is willing to learn new ways of communicating.	Demonstrates a range of communication and leadership styles and uses them to effectively achieve SF goals. Identifies the needs and desires of others and strategically incorporates them into personal and team actions. Successfully compensates for personal or team deficits when working with others.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

19. Overall, how effective is this Soldier at BUILDING AND MAINTAINING RELATIONSHIPS?

Is unable or unwilling to develop and maintain relationships needed to facilitate mission accomplishment. Demonstrates a lack of courtesy, does not help others or maintain a network of connections, and/or does not adapt behavior to the social environment.	Understands the necessity of building and maintaining relationships for mission accomplishment. Is courteous and helpful, maintains a network of connections, and adapts behavior appropriately for social environment.	Builds and maintains interpersonal bonds which directly contribute to mission accomplishment by providing self and team access to expert advice, problem solving assistance, and opportunities. Successfully maintains good relationships both inside and outside SF.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

20. OVERALL, how effective is this Soldier? Consider people skills and other important performance factors.

Performs poorly in important effectiveness areas; does not meet standards for Soldier performance compared to peers at same experience level.	Performs adequately in important effectiveness areas; meets standards and expectations for Soldier performance compared to peers at same experience level.	Performs excellently in all or almost all effectiveness areas; exceeds standards and expectations for Soldier performance compared to peers at same experience level.

| Needs Much Improvement | Needs Some Improvement | Adequate | More Than Adequate | Outstanding |

Appendix C
Summary of Advisory Board Comments

Summary of Advisory Board Comments

27 May 2003
1400 - 1600

Training system content
1. Interpersonal skills are important. Effective training system is needed and would be used.
2. Details of interpersonal skill use are different when deployed (used the term tailored). However, basic skill sets are the same when deployed and when not deployed.
3. Outside of Special Forces Assessment and Selection and the Qualification Course, interpersonal skill training does not exist.
4. System should be interactive – paper-based systems will not be used.
5. Assessment tools to pinpoint exactly where a subordinate needs help would be useful.
6. Would like a database of interpersonal situations and what works (from previous missions) that they can use for pre-deployment planning and role-playing. Similar to companycommand.com. *Emphasized this point several times.*
7. Suggest not using 'interpersonal skills'. 'People skills' or 'interaction skills' are more comfortable terms.
8. Feedback should be kept at the team or individual level. Sharing feedback outside of the team won't work.
9. Feedback should always be face-to-face. Online feedback is not acceptable. Precedent for face-to-face feedback – focus group thought SF Soldiers would be comfortable with face-to-face feedback. However, they seemed to prefer commander-based feedback, instead of peer.
10. Need to be able to manipulate amount of time used for training from a few hours to several days. They felt that if the training was useful, they would give several days to it.
11. Not comfortable with the 'coaching' aspect of the system, but were comfortable with ongoing assessment and feedback. Felt didn't know enough about each dimension to be effective coaches. Training that explained the basic concepts for each dimension is needed.
12. Suggest collecting data by mission and country because interpersonal requirements differ.
13. Do not want to assess on all 15 dimensions, too time consuming. Suggest assessing on the 5 major categories and if a problem emerges, drill down to the sub-dimensions.

Development process
1. Physical presence (of researcher) necessary to facilitate data collection.
2. Suggest collecting data at all 5 SF sites to develop online database of interpersonal knowledge. Data collection should occur during red cycle (this is the cycle designated for support taskings that require Soldier assistance). Asking for 4-5 hours from a team is not unreasonable. Teams should have Foreign Internal Defense experience. Tape interviews.
3. Support for data collection needs to come from US Army Special Operations Command.

Appendix D
Focus Group Informed Consent

SF People Skill Assessment Focus Group
Informed Consent

The purpose of this focus group is to obtain candid comments and feedback from SF Soldiers about a set of assessment scales developed to measure people skills among SF Soldiers. The people skill scales are part of a research effort through the Department of Defense and the U.S. Army Research Institute to evaluate and enhance people skills in SF. The information you provide today can make an important difference in how effectively people skills are measured. Your contribution is greatly appreciated.

The comments and feedback we collect today will be recorded anonymously. At no time will specific comments be attributed to specific individuals. We also ask that you not attribute specific comments to specific individuals if you discuss this session with other Soldiers later on.

Your participation is voluntary, and you may withdraw from the focus group at any time and for any reason. There is no penalty for not participating or withdrawing.

This research is being conducted by Dr. Tara Carpenter at Federal Management Partners and Dr. Michelle Wisecarver at the U.S. Army Research Institute. They can be reached for questions or comments at:

Tara Carpenter: 703-671-6600, X111
Michelle Wisecarver: 703-617-0318

I have read this form and agree to participate in the focus group.

Signature:	Date:

Appendix E
Focus Group Protocol

Focus Group Protocol

Thanks for participating today. I am especially grateful to any of you who have already spent time on this project by providing or categorizing examples of SF people skills.

Introduce facilitator and recorder.

The purpose of today's session is to get your feedback on a set of assessment scales designed to measure people skills in SF. This is a tool we are trying to develop that could be used, mainly by supervisors, to help Soldiers who have trouble with people skills figure out more specifically what they need to work on to improve. So when you fill this out, imagine being a supervisor and using this to provide feedback to one of your subordinates. This project is being conducted as part of a DoD research grant managed by the U.S. Army Research Institute.

Today's session will consist of two parts. First, you will be asked to complete the people skill assessment form for an anonymous peer or subordinate. After completing the form we'll discuss your feedback on the assessment including form readability, time required, structure of the form, and utility of the assessment. This session will be completed in two hours.

The comments and feedback we collect today will be recorded anonymously. At no time will specific comments be attributed to specific individuals. All information will be reported and analyzed in aggregate form.

Pass out informed consent forms and pencils.
Ask participants to read and sign informed consent.

Pass out assessment forms.

Please think about a specific Soldier you work with that you could complete an assessment on. The Soldier should be someone you have worked with extensively in the last year. It should either be someone of the same rank as you or lower. You will not be asked to identify this Soldier. You will be asked how long you have worked with this Soldier, the Soldier's rank, and your rank. The forms will be collected and ratings assessed for their psychometric properties (in other words to check that statistically the rating scales work appropriately). We will not be discussing the person you rated, and the other folks here today will not be looking at your form. As you're completing the form please keep in mind any comments you have about how to increase the utility of the assessment. We'll be asking for your feedback on how it was to use the form after everyone has completed the assessment.

This assessment is designed to be a comprehensive evaluation of people skills. Using a database of almost 500 descriptions of people skills in SF, 4 broad skills with 15 sub-skills were identified. Completion of the assessment will take less than 30 minutes. We'll be asking for your feedback on time requirements after the assessments are completed.

Focus Group Questions:

Thanks for completing the assessment. For the second half of this session, I'll be asking for your feedback. The comments and feedback we collect today will be recorded anonymously. As stated previously, at no time will specific comments be attributed to specific individuals. All information will be reported and analyzed in aggregate form.

Questions

First impressions

What are your first impressions of the form? Overall positive? Negative?

Ease-of-use
Are the questions easy to read?
Will people read the anchors?
How can the questions be changed to make them clearer?
Is the form easy to use?
How can the form be changed to make it easier to use?
Would a drill down assessment be effective? The four major scales (grey) are used first and if a Soldier is given a low rating, the additional scales in that area are used?
Is the amount of time it takes to complete the form appropriate?

Utility
As a commander, would you find the people skill assessment useful?
When would (e.g. red cycle, amber cycle) the assessment be useful?
If you were given feedback based on this assessment from your commander would you find it useful?
If you were given feedback based on this assessment from a teammate of equal rank would you find it useful?

Accuracy
Do the questions seem to accurately capture people skills in SF?
Do the questions seem to comprehensively capture people skills in SF?

Final thoughts
Overall, what is your reaction to the assessment?
Is this type of assessment useful in SF?
What would make the assessment more useful?

Appendix F
Assessment System Evaluation: Descriptive Statistics

Assessment System Evaluation: Descriptive Statistics

Rating Scale	Sample Size (N)	Mean (SD)
Energizing Others	16	3.50 (1.21)
Rewarding Others	16	3.25 (1.00)
Influencing Others	16	3.56 (1.09)
Establishing and Maintaining Control	16	3.37 (0.96)
Training and Developing	16	3.56 (1.09)
Coordinating	16	3.37 (1.31)
Directing Others	16	3.37 (1.02)
Managing Others' Relationships	16	3.38 (0.81)
Role Modeling	15	3.67 (1.18)
Managing Perceptions	16	3.44 (1.21)
Managing Personnel	16	3.13 (1.02)
Exchanging Information	16	3.63 (1.09)
Gathering Information	16	3.69 (1.01)
Informing	16	3.69 (0.95)
Networking/Maintaining Connections	16	3.44 (0.89)
Demonstrating Courtesy	16	3.38 (1.09)
Adapting to the Social Environment	16	3.63 (1.02)
Building and Maintaining Relationships	16	3.38 (0.96)
Overall Effectiveness	16	3.56 (0.96)

Appendix G
Exploratory Regression Analyses

Exploratory Regression Analyses

Two exploratory regression analyses were conducted to assess the variance accounted for in overall effectiveness by the interpersonal performance dimensions. Stepwise regression analysis was used for both. In the first analysis, overall effectiveness was regressed onto the four general interpersonal performance dimensions (See Tables 1-3). In the second analysis, overall effectiveness was regressed onto the 15 interpersonal performance subscales (See Tables 4-6). Sixty-eight percent (adjusted R^2) of the variance in the overall effectiveness rating is accounted for by four general scales and 59% (adjusted R^2) of the overall effectiveness rating is accounted for by the fifteen subscales. In each model only a single regression coefficient reached significance, likely due at least in part to the small sample. Because of the exploratory nature of the analyses and small sample, no conclusions should be drawn from these analyses. For future analyses, the magnitude of the variance accounted for and the significance of the R^2's can provide an indication of the importance of the interpersonal performance scales for predicting performance among SF Soldiers. Results from these analyses suggest the scales show promise.

Table 1. Regression Model Summary - Using Summary Dimensions to Predict Overall Performance

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.840(a)	.705	.684	.54176

a Predictors: (Constant), Building and Maintaining Relationships

Table 2. Significant Coefficients - Using Summary Dimensions to Predict Overall Performance

Model		Unstandardized Coefficients		Standardized Coefficients		
		B	Std. Error	Beta	t	Sig.
1	(Constant)	.709	.511		1.387	.187
	Building and Maintaining Relationships	.845	.146	.840	5.787	.000

a Dependent Variable: Overall Effectiveness

Table 3. Excluded Variables - Using Summary Dimensions to Predict Overall Performance

Model		Beta In	T	Sig.	Partial Correlation	Collinearity Statistics Tolerance
1	Exchanging Information	.246(a)	1.195	.254	.315	.481
	Directing Others	.287(a)	1.552	.145	.395	.561
	Energizing Others	.148(a)	.724	.482	.197	.524

a Predictors in the Model: (Constant), Building and Maintaining Relationships
b Dependent Variable: Overall Effectiveness

Table 4. Regression Model Summary - Using the 15 Rating Scales to Predict Overall Performance

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.786(a)	.618	.589	.57679

a Predictors: (Constant), Rewarding Others

Table 5. Significant Coefficients - Using the 15 Rating Scales to Predict Overall Performance

Model		Unstandardized Coefficients B	Std. Error	Standardized Coefficients Beta	t	Sig.
1	(Constant)	1.250	.547		2.284	.040
	Rewarding Others	.725	.158	.786	4.590	.001

a Dependent Variable: Overall Effectiveness

Table 6. Excluded Variables - Using the 15 Rating Scales to Predict Overall Performance

Model		Beta In	t	Sig.	Partial Correlation	Collinearity Statistics
						Tolerance
1	Influencing Others	.045(a)	.188	.854	.054	.543
	Coordinating	-.093(a)	-.404	.693	-.116	.594
	Training and Developing	.048(a)	.241	.814	.069	.783
	Managing Perceptions	.109(a)	.443	.666	.127	.519
	Managing Others Relationships	.049(a)	.245	.810	.071	.777
	Establishing and Maintaining Control	.030(a)	.159	.877	.046	.892
	Role Modeling	.412(a)	1.783	.100	.458	.472
	Managing Personnel	-.056(a)	-.295	.773	-.085	.870
	Informing	.116(a)	.576	.575	.164	.767
	Gathering Information	.286(a)	1.553	.146	.409	.782
	Demonstrating Courtesy	-.171(a)	-.942	.365	-.263	.896
	Helping Others	.283(a)	1.561	.144	.411	.805
	Networking/Maintaining Connections	.026(a)	.140	.891	.040	.914
	Adapting to the Social Environment	-.108(a)	-.566	.582	-.161	.857

a *Predictors in the Model: (Constant), Rewarding Others*
b *Dependent Variable: Overall Effectiveness*

Appendix H
Focus Group Feedback

Focus Group Feedback

28 & 29 July 2003
Ft. Bragg

What is the current state of interpersonal skill assessment and management?
➢ Leadership knows about interpersonal skill issues, but won't address the problem in the right way.
➢ Team leaders manage the person with problems by not giving them tasks which require interpersonal skills.
➢ Problem is with the recruitment – can't change the person once they are in SF.

Should interpersonal skill assessment and/or training be voluntary?
➢ Suggest the assessment and any subsequent interventions be voluntary.
➢ Suggest using a contact team so if a commander wants help he can get it. He can choose which guys need help and then has someone who he can contact to send the guy to. Used IT metaphor: If I have a problem with my PC, I call a certain number, would like a similar system for interpersonal skills.
➢ Suggest customizing assessment: What is his MOS, junior or senior, how long has he been jr. or sr., what is his role when you guys go split section (team split between two missions), does he teach classes to the team or to others, how often? What have you (as a commander) done to help this problem? Maybe give the commander some advice on what to do, then ask later if he still wants to refer him to come get further training.
➢ Don't make this a requirement. Want the commander coming to you, rather than you going to them. If it is seen as a requirement (extra paperwork), the system won't get used.

Who should be assessed and receive training?
➢ Say that need at team level to identify fit of individuals in team, not individual level. *Note this suggestion directly contradicts feedback given at 27 May 2003 Advisory Board meeting.*
➢ If a guy is open and trainable, may use this but it won't help for everyone.

Who should do the assessment?
➢ Team leaders should do the assessment. *Point repeated several times.*
➢ When they have peers rate on 9 SF attributes that works work because those attributes are quantifiable skills. Need to make sure these are quantifiable.

When should assessment and development occur?
➢ Need during SFAS.
➢ May be more acceptable during SFAS with younger guys.
➢ Need at multiple points (training, field, etc.). Different things might come out, can look at trends. Use the same questions every time, but you might see differences depending on what team is doing.
➢ Use prior to becoming a team member, use during the pipeline.
➢ Don't see how Soldiers react under stress until phase 4 and seeing these skills under stress is what is important.
➢ Make everyone sit down and do this on everyone and himself. If this is just within the team it would be filled out honestly.
➢ Maybe this would be useful in peer events because then you see if everyone feels that you screwed up.

Assessment form
➢ This assessment provides proof of what I have in my mind. This is a family business, we know these guys.
➢ You can manipulate the form to say what you already think.
➢ Rewarding others – staff sgt. Doesn't have anyone under him to reward. Maybe have short bullet comments after the title instead of the paragraphs.
➢ Suggest adding scales for listening and interpreting.
➢ The language itself – explains what it is, but doesn't jog a guy's memory toward specific instances. Use SF language (e.g. HN, executing direct action missions, MOS cross-training). Have bullet points that they could use to jog memory and check off what applies.

- Also have several lines where they can write in examples that apply.
- Have two different forms: one that applies to someone who has leadership responsibilities, one that applies to someone who doesn't.
- Need to separate out ratings for how someone acts in relation to supervisors, peers, subordinates, HN
- Maybe ask "If your Soldier was in this situation... how would he perform?" This allows for a person to express how he knows this guy would perform (and why). He may not have experiences to draw from in rating because he has never put him in that position before because he knows he wouldn't do well.
- Suggest changing scales anchors from 'adequate' and 'more than adequate' to 'good' and 'very good'.
- Ask specific questions and leave them open-ended.
- The length is fine. *Repeated several times.*

Appendix I
Modified Assessment Form: Leader

People Skill Assessment for Leaders

Circle the rating that most accurately describes the selected leader's performance. Action summaries describe 3 performance levels: **Needs much improvement, Good,** and **Outstanding.** If you feel the leader's performance falls between these levels, circle **Needs some improvement** or **Very good**. A leader does not need to demonstrate every skill described to be rated at a given level, but should, in general, demonstrate this level of proficiency. There are 20 ratings. Think about where the leader will fall on each scale, and then read through the comments in that box to make sure he fits. If he doesn't, read the comments in the other boxes and adjust your rating accordingly.

ENERGIZING OTHERS

1. How effective is this leader at **REWARDING OTHERS?**

Does not give credit to others for their work. Is not able to identify rewards that are motivating to others. Rewards immediately desired actions without considering long term consequences and/or rewards actions that have negative consequences.	Rewards actions that help achieve the mission. Identifies what a person or group finds most rewarding. Uses a variety of strategies for reinforcing desired actions including recognizing accomplishments and tangible rewards.	Anticipates situations where rewards are needed and plans ahead to have rewards ready. Is innovative in finding ways to reinforce desired actions. In groups, knows to whom rewards should be given to get results.
Needs Much Improvement	**Needs Some Improvement**	**Good** **Very Good** **Outstanding**

Additional Comments:

2. How effective is this leader at **INFLUENCING OTHERS?**

Unable to influence others. Uses influence strategies that others react to negatively. Is not successful in gaining the trust of team members, superiors, and/or Host Nation (HN) personnel.	Uses authority appropriately. Can influence others in a variety of ways such as making logical arguments, drawing on personal relationships, offering something in return, and appealing to personal interests.	Can influence others effectively in tense and high stake situations. Maintains effective performance of team under stress. Exerts influence effectively with peers, superiors, and HN personnel. Identifies key people to influence in complex situations.

| Needs Much Improvement | Needs Some Improvement | Good | Very Good | Outstanding |

Additional Comments:

3. Overall, how effective is this leader at **ENERGIZING OTHERS?**

Unable to motivate others, including team members and HN personnel, toward mission accomplishment. Does not use effective influence or reward strategies.	Successful at energizing team members and HN personnel to accomplish mission goals under most circumstances. Uses a variety of influence and reward strategies effectively.	Successful at energizing a variety of groups (including higher command) to accomplish mission goals under stress and when conflicting agendas are present. Adeptly matches influence and reward strategies to situational demands.

| Needs Much Improvement | Needs Some Improvement | Good | Very Good | Outstanding |

Additional Comments:

DIRECTING OTHERS

4. How effective is this leader at COORDINATING?

Ineffective at managing Army and/or HN administrative procedures. Does not anticipate needs of command or team effectively. Does not clarify roles when working with others. Has trouble planning, organizing, and executing tasks under tight deadlines.	Comfortable interacting with HN personnel to obtain necessary resources. Successfully negotiates Army and HN administrative procedures. Helps identify clear roles for those involved when working in groups. Considers others' workload when assigning tasks.	Obtains and organizes personnel and resources to accomplish mission objectives. Effectively coordinates long rang planning efforts that involve multiple groups (e.g. SF teams, HN personnel, other US military). Increases group efficiency by clearly defining tasks.
Needs Much Improvement	**Needs Some Improvement**	**Good**	**Very Good**	**Outstanding**

Additional Comments:

5. How effective is this leader at **TRAINING AND DEVELOPING?**

Does not match training techniques to learning style of trainee(s). Loses control of training environment or learner attention. Is unprepared when delivering training. Lacks knowledge of training material. Does not ensure trainee safety. Unable to obtain positive change when counseling other Soldiers.	Comfortably uses a variety of teaching techniques and matches teaching technique to learning style of trainees. Is knowledgeable of training material. Notices trainee mistakes and demonstrates correct procedures. Ensures that trainees competently execute trained tasks. Maintains a safe training environment.	Independently identifies others developmental needs and provides appropriate training and/or developmental experiences. Notices and takes advantage of opportunities to teach others as they occur. Innovatively adapts training techniques and materials to learner needs. Encourages multifunctionality among team members and provides training accordingly.
Needs Much Improvement	**Needs Some Improvement**	**Good** **Very Good** **Outstanding**

Additional Comments:

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6. How effective is this leader at **MANAGING PERCEPTIONS?**

Does not represent self or team well to higher command. Does not represent SF and/or U.S. positively to HN personnel. Does not appear trustworthy to others. Is perceived as sloppy, lazy, and/or unprepared for assigned duties.	When mistakes are made, this Soldier handles the situation in a way that builds confidence in his and/or his team's abilities. Is perceived as a team player, dependable, and trustworthy. Is professional in demeanor and in written communication. Appears competent in demanding situations.	Perceived as having important expertise and making a positive contribution at all times. Gains the trust of key personnel within and outside of SF. Is able to manage how he, his team, and SF are perceived by multiple groups with competing agendas. Creates positive impressions for media.
Needs Much Improvement	**Needs Some Improvement**	**Good** **Very Good** **Outstanding**

Additional Comments:

7. How effective is this leader at MANAGING OTHERS RELATIONSHIPS?

Takes no action to stop conflict among others. Creates situations that pit people against each other. Is unaware of how his actions influence relationships among others.

Uses authority to stop conflict when appropriate. Encourages other Soldiers to build rapport with HN personnel. Understands other cultures and uses this knowledge to build rapport between SF and other groups such as HN personnel and other US military.

Anticipates potential conflict situations and prevents them from occurring. Facilitates understanding and mutual respect between individuals and groups. Builds rapport among others in tense and/or quickly developing situations.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

8. How effective is this leader at Establishing and Maintaining CONTROL?

Does not identify or use available resources to maintain effective performance of team members, subordinates, and/or HN personnel. Allows peers, subordinates, or HN personnel to engage in unsafe practices.

Maintains control of situations when dissent is present. Acts decisively to control situations when necessary. Effectively uses established systems to stop undesirable actions. Keeps team focused on mission.

Prevents dissent from occurring and/or transforms dissent into support. Establishes and executes plans for maintaining discipline and effective performance. Establishes and enforces consequences for undesirable actions.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments

9. How effective is this leader at ROLE MODELING?

Does not model safe practices to SF Soldiers, other US military, and/or HN personnel. Sets poor example for other team members by complaining, being lazy, or belittling others. Holds others to higher standard of behavior than self.

Demonstrates positive attitude. Sets example by performing effectively when scared, tired, in pain, and/or under stress. Is professional in all interactions. Models safe practices for SF and HN personnel.

Takes initiative and motivates others by setting example in difficult, physically demanding, and emotionally stressful situations. Demonstrates willingness to do undesirable tasks. Sets example by going beyond what is expected.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

10. How effective is this leader at STAFFING?

Does not solicit or take advice from others when he should. Does not consider desires or expertise of other team members when assigning tasks or requesting help. Makes personnel changes for poor reasons and/or at inappropriate times.

Assigns tasks to those who have the expertise to effectively execute them. Uses a variety of resources to staff tasks and projects. Effectively uses established procedures to recruit necessary personnel.

Uses available personnel effectively to accomplish missions under tight deadlines, stressful and demanding situations, and when resources are limited. Balances requirements for expertise with developmental needs of personnel when delegating assignments.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

11. Overall, how effective is this leader at DIRECTING OTHERS?

Is unable or unwilling to guide the actions of others toward mission accomplishment. This may include an inability or unwillingness to coordinate, train and develop others, manage perceptions, manage others relationships, establish and maintain control, role model appropriate behavior, or staff effectively.

Able and willing to guide the actions of others toward mission accomplishment in most circumstances. Shows ability to coordinate, train and develop others, manage perceptions, manage others relationships, establish and maintain control, role model appropriate behavior, and staff effectively.

Plays a pivotal role in guiding the actions of others toward mission accomplishment. Shows ability to coordinate, train and develop others, manage perceptions, manage others relationships, establish and maintain control, role model appropriate behavior, and staff effectively even under tight deadlines, in stressful and demanding situations, and when resources are limited.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

EXCHANGING INFORMATION

12. How effective is this leader at INFORMING?

Does not pass on information needed for effective planning or mission execution. Communicates unnecessary or irrelevant information. Does not identify and/or respond to information needs of others.

Accurately identifies information needs and concisely provides requisite information. Clearly describes procedures, objectives, and requirements to others. Is comfortable conveying information to HN personnel.

Adjusts communication style to needs of listeners. Conveys necessary information to multiple groups, including HN personnel and commanders, SF commanders, and other US military, effectively. Independently anticipates information needs and provides needed information.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

13. How effective is this leader at GATHERING INFORMATION?

Does not gather accurate and/or complete information. Does not take time to accumulate necessary information. Makes incorrect assumptions. Reports out-of-date information. Is not comfortable gathering information from HN personnel.	Disregards inaccurate information. Is able to learn and use other languages to gather information. Is able to gather important information in stressful and demanding situations. Keeps needed information complete and up-to-date.	Successfully uses a variety of information sources including subordinates, peers, commanders, other US military, and HN personnel. Independently anticipates information needs and gathers requisite information. Identifies and uses expert sources for gathering information.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

14. Overall, how effective is this leader at EXCHANGING INFORMATION?

Shows an inability or unwillingness to communicate information effectively or gather information needed for mission accomplishment.	Contributes to mission accomplishment by gathering important information and concisely communicating that information to appropriate sources.	Independently anticipates information needs and adeptly uses a variety of sources to gather information. Uses a variety of communication techniques to inform subordinates, peers, commanders, and HN personnel.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

BUILDING AND MAINTAINING RELATIONSHIPS

15. How effective is this leader at DEMONSTRATING RESPECT FOR OTHERS?

Does not respect individual differences. Is not willing to learn about or engage in HN customs. Is uncooperative, condescending, and/or insulting to others. Wastes others' time.	Acknowledges the accomplishments of others. Shows respect for the experience of others. Is tolerant of individual differences, including others' personal quirks. Is willing to learn about and take part in HN customs.	Identifies and is concerned with others' needs, even when those needs are not obvious. Listens attentively to others. Actively participates in HN customs. Expresses genuine excitement about others' accomplishments.
Needs Much Improvement	**Needs Some Improvement**	**Good** **Very Good** **Outstanding**

Additional Comments:

16. How effective is this leader at HELPING OTHERS?

Puts self interest and welfare above that of team. Is unaware when HN personnel and/or team members, need assistance. Avoids opportunities to volunteer.	Notices when team members, HN personnel, and others need assistance. Effectively uses organizational resources to help others. Willing to volunteer when needed.	Devotes personal time and effort to team members and HN personnel. Helps team members overcome personal difficulties or crisis. Draws on personal resources and expertise to assist others. Seeks out opportunities to volunteer.
Needs Much Improvement	**Needs Some Improvement**	**Good** **Very Good** **Outstanding**

Additional Comments:

17. How effective is this leader at NETWORKING/MAINTAINING CONNECTIONS?

Overlooks or avoids opportunities to build relationships, both within and outside SF. Is not willing to put forth effort to communicate with HN personnel. Is seen as unfriendly and/or distant.	Builds relationships with HN personnel, including learning and using new languages when necessary. Spends time with others including attending social events and participating in HN customs when appropriate.	Establishes and maintains contacts within and outside of SF (including HN personnel) and uses their assistance to facilitate mission accomplishment. Adeptly finds common ground with others even when commonalities are not obvious.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

18. How effective is this leader at ADAPTING TO THE SOCIAL ENVIRONMENT?

Is unaware of and/or unwilling to engage in HN customs. Is uncomfortable or awkward interacting with people from different backgrounds. Ignores input from experienced personnel including team members.	Accurately identifies others' needs and desires, including HN personnel, and alters actions appropriately. Interacts with others in ways with which they are comfortable. Is willing to learn new ways of communicating.	Demonstrates a range of communication and leadership styles and uses them to effectively achieve SF goals. Identifies the needs and desires of others and strategically incorporates them into personal and team actions. Successfully compensates for personal or team deficits when working with others.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

19. Overall, how effective is this leader at **BUILDING AND MAINTAINING RELATIONSHIPS?**

Is unable or unwilling to develop and maintain relationships needed to facilitate mission accomplishment. Demonstrates a lack of courtesy, does not help others or maintain a network of connections, and/or does not adapt behavior to the social environment.	Understands the necessity of building and maintaining relationships for mission accomplishment. Is courteous and helpful, maintains a network of connections, and adapts behavior appropriately for social environment.	Builds and maintains interpersonal bonds which directly contribute to mission accomplishment by providing self and team access to expert advice, problem solving assistance, and opportunities. Successfully maintains good relationships both inside and outside SF.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

20. **OVERALL,** how effective is this leader? Consider people skills **and** other important performance factors.

Performs poorly in important effectiveness areas; does not meet standards for Soldier performance compared to peers at same experience level.	Performs adequately in important effectiveness areas; meets standards and expectations for Soldier performance compared to peers at same experience level.	Performs excellently in all or almost all effectiveness areas; exceeds standards and expectations for Soldier performance compared to peers at same experience level.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

**Appendix J
Modified Assessment Form: Soldier**

People Skill Assessment for Soldiers

Circle the rating that most accurately describes the selected Soldier's performance. Action summaries describe 3 performance levels: **Needs much improvement, Good,** and **Outstanding**. If you feel the Soldier's performance falls between these levels, circle **Needs some improvement** or **Very good**. A Soldier does not need to demonstrate every skill described to be rated at a given level, but should, in general, demonstrate this level of proficiency. There are 8 ratings. Think about where the Soldier will fall on each scale, and then read through the comments in that box to make sure he fits. If he doesn't, read the comments in the other boxes and adjust your rating accordingly.

DIRECTING OTHERS

1. How effective is this Soldier at **MANAGING PERCEPTIONS?**

Does not represent self or team well to higher command. Does not represent SF and/or U.S. positively to HN personnel. Does not appear trustworthy to others. Is perceived as sloppy, lazy, and/or unprepared for assigned duties.	When mistakes are made, this Soldier handles the situation in a way that builds confidence in his and/or his team's abilities. Is perceived as a team player, dependable, and trustworthy. Is professional in demeanor and in written communication. Appears competent in demanding situations.	Perceived as having important expertise and making a positive contribution at all times. Gains the trust of key personnel within and outside of SF. Is able to manage how he, his team, and SF are perceived by multiple groups with competing agendas. Creates positive impressions for media.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

EXCHANGING INFORMATION

2. How effective is this Soldier at GATHERING INFORMATION?

Does not gather accurate and/or complete information. Does not take time to accumulate necessary information. Makes incorrect assumptions. Reports out-of-date information. Is not comfortable gathering information from HN personnel.

Disregards inaccurate information. Is able to learn and use other languages to gather information. Is able to gather important information in stressful and demanding situations. Keeps needed information complete and up-to-date.

Successfully uses a variety of information sources including subordinates, peers, commanders, other US military, and HN personnel. Independently anticipates information needs and gathers requisite information. Identifies and uses expert sources for gathering information.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

BUILDING AND MAINTAINING RELATIONSHIPS

3. How effective is this Soldier at DEMONSTRATING RESPECT FOR OTHERS?

Does not respect individual differences. Is not willing to learn about or engage in HN customs. Is uncooperative, condescending, and/or insulting to others. Wastes others' time.	Acknowledges the accomplishments of others. Shows respect for the experience of others. Is tolerant of individual differences, including others' personal quirks. Is willing to learn about and take part in HN customs.	Identifies and is concerned with others' needs, even when those needs are not obvious. Listens attentively to others. Actively participates in HN customs. Expresses genuine excitement about others' accomplishments.
Needs Much Improvement	**Needs Some Improvement** **Good**	**Very Good** **Outstanding**

Additional Comments:

4. How effective is this Soldier at HELPING OTHERS?

Puts self interest and welfare above that of team. Is unaware when HN personnel and/or team members, need assistance. Avoids opportunities to volunteer.	Notices when team members, HN personnel, and others need assistance. Effectively uses organizational resources to help others. Willing to volunteer when needed.	Devotes personal time and effort to team members and HN personnel. Helps team members overcome personal difficulties or crisis. Draws on personal resources and expertise to assist others. Seeks out opportunities to volunteer.
Needs Much Improvement	**Needs Some Improvement** **Good**	**Very Good** **Outstanding**

Additional Comments:

5. How effective is this Soldier at NETWORKING/MAINTAINING CONNECTIONS?

| Overlooks or avoids opportunities to build relationships, both within and outside SF. Is not willing to put forth effort to communicate with HN personnel. Is seen as unfriendly and/or distant. | Builds relationships with HN personnel, including learning and using new languages when necessary. Spends time with others including attending social events and participating in HN customs when appropriate. | Establishes and maintains contacts within and outside of SF (including HN personnel) and uses their assistance to facilitate mission accomplishment. Adeptly finds common ground with others even when commonalities are not obvious. |

| Needs Much Improvement | Needs Some Improvement | Good | Very Good | Outstanding |

Additional Comments:

6. How effective is this Soldier at ADAPTING TO THE SOCIAL ENVIRONMENT?

Is unaware of and/or unwilling to engage in HN customs. Is uncomfortable or awkward interacting with people from different backgrounds. Ignores input from experienced personnel including team members.	Accurately identifies others' needs and desires, including HN personnel, and alters actions appropriately. Interacts with others in ways with which they are comfortable. Is willing to learn new ways of communicating.	Demonstrates a range of communication and leadership styles and uses them to effectively achieve SF goals. Identifies the needs and desires of others and strategically incorporates them into personal and team actions. Successfully compensates for personal or team deficits when working with others.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

7. Overall, how effective is this Soldier at BUILDING AND MAINTAINING RELATIONSHIPS?

Is unable or unwilling to develop and maintain relationships needed to facilitate mission accomplishment. Demonstrates a lack of courtesy, does not help others or maintain a network of connections, and/or does not adapt behavior to the social environment.	Understands the necessity of building and maintaining relationships for mission accomplishment. Is courteous and helpful, maintains a network of connections, and adapts behavior appropriately for social environment.	Builds and maintains interpersonal bonds which directly contribute to mission accomplishment by providing self and team access to expert advice, problem solving assistance, and opportunities. Successfully maintains good relationships both inside and outside SF.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments:

8. OVERALL, how effective is this Soldier? Consider people skills **and** other important performance factors.

Performs poorly in important effectiveness areas; does not meet standards for Soldier performance compared to peers at same experience level.	Performs adequately in important effectiveness areas; meets standards and expectations for Soldier performance compared to peers at same experience level.	Performs excellently in all or almost all effectiveness areas; exceeds standards and expectations for Soldier performance compared to peers at same experience level.

Needs Much Improvement	Needs Some Improvement	Good	Very Good	Outstanding

Additional Comments: