One

OVERVIEW

The Myers-Briggs Type Indicator® (MBTI®) personality inventory is firmly grounded in C. G. Jung's theory of psychological types, first presented in his book *Psychological Types* (1921/1971). MBTI assessment of type has been available in published form since 1943. A wealth of information has since been generated about the instrument's theoretical basis, its reliability and validity, and its practical application in widely diverse areas. There are currently three different versions of the instrument that are known as MBTI® Step I,™ MBTI® Step II,™ and MBTI® Step III.™ The Step I version identifies 16 qualitatively different personality types comprised of preferences for one of each pole of four dichotomies. The Step I form of the MBTI instrument is the best-known and most frequently used of the three options and is what most people mean when they refer to "the MBTI." There are three editions of the MBTI (Step I) manual (Myers, 1962; Myers & McCaulley, 1985; Myers, McCaulley, Quenk, & Hammer, 1998), as well as a comprehensive review of research in seven application areas (Hammer, 1996). These and many other sources contain valuable information about the theory, psychometric characteristics, research relationships, and applications of the MBTI assessment in its Step I form. The sheer magnitude of what is available can be daunting to those new to the instrument as well as to experienced practitioners seeking practical guidance for administering and interpreting the instrument.

The MBTI Step II instrument identifies five facets (components) of each of the four basic dichotomies, 20 facets in all. Scores provide information about individuality within each of the 16 types. Its manual (Quenk, Hammer, & Majors, 2001) details the instrument's psychometric properties and appropriate applications. The newest version of the MBTI instrument, the Step III form (Myers, McCaulley, Quenk, Hammer, & Mitchell, 2009) assesses type development, the varying effectiveness with which individuals use their type. The present volume focuses mainly on Step I assessment but also provides sufficient information about the MBTI Step II instrument to enable practitioners to choose which of these two steps is appropriate for their clients. Issues of type development,

the focus of Step III assessment, are mentioned in relevant areas of the text. However, a detailed discussion of this most recent version of the MBTI assessment is beyond the scope of this book.

Essentials of MBTI Assessment encapsulates the overwhelming amount of MBTI information by providing all key information in a manner that is straightforward and easily accessible. Each chapter includes several "Rapid Reference," "Caution," and "Don't Forget" boxes that highlight important points relevant to each topic. Chapters end with a series of questions designed to solidify what you have read. The primary emphasis is on clinical uses of the instrument; however, professionals in any area of application will find the basic information they need to effectively administer and interpret the MBTI assessment in their setting.

HISTORY AND DEVELOPMENT

Jung's *Psychological Types* (1921/1971) was translated into English in 1923. Interest in the work was generally limited to Jungian and psychoanalytic circles in both Europe and America. It was fortuitous, if not remarkable, that two women, Katharine C. Briggs and her daughter, Isabel Briggs Myers (neither of whom had credentials in Jungian analysis or psychological test development), read Jung's work, spent 20 years studying it, and devised an instrument—the MBTI questionnaire—to assess typology. Their years of intensive reading of Jung and careful observation of individual behavior led to their conclusion that typology could provide a useful way of describing healthy personality differences and, importantly, that such assessment could be put to practical use in people's lives.

Jung's interest in types emerged from his observation of consistent differences among people that were not attributable to their psychopathology. At first he believed that two basic *attitude types*—extraverts and introverts—adequately explained the differences he found. Further observation convinced him that other differences must be at work and that his two-category typology was inadequate. He subsequently added opposite *mental functions* to his descriptive system: two opposite functions of perception, sensation (now Sensing) versus intuition, and two opposite functions of judgment, thinking versus feeling.

Briggs's early interest had been in the variety of ways that people achieved excellence in their lives. Prior to discovering Jung's work, she had studied biographies in an effort to develop her own typology. In addition to opposites similar to those described by Jung, she observed that individuals differed in the way they habitually related to the outside world. Her early observations ultimately led to the addition of a fourth pair of opposites to Jung's system, a Judging versus a Perceiving attitude toward the outer, extraverted world. Although Jung did not explicitly identify this pair of opposites, Briggs and Myers found it to be implicit in his writings.

Published forms of the MBTI instrument have been in existence since 1943. Until 1975, when its publication moved from Educational Testing Service to CPP, Inc., it was used primarily by a small number of enthusiastic researchers. CPP, Inc. made the MBTI available to all professionals who were qualified to purchase Level B instruments. About 2 million people fill out the MBTI questionnaire annually, making it by far the most widely used instrument for assessing normal personality functioning.

Rapid Reference 1.1 gives a chronological listing of significant events in the history of MBTI development.

Rapid Reference

1.1 Background and Development of the MBTI

1917	Katharine Briggs develops a way of describing individual differences in ways of achieving excellence based on her study of biographies of accomplished individuals.
1923	Jung's *Psychological Types* is translated into English from the original German, first published in 1921.
1923–1941	Briggs and Myers study Jung's typology and observe its expression in the behavior of individuals.
1941	World War II motivates Myers to work on developing an instrument that will give people access to their Jungian type—to capitalize on natural preferences to help the war effort.
1942–1944	Myers writes and tests items using a small criterion group whose preferences are clear to her. Forms A and B are created.
1942–1956	MBTI data are collected on various samples, including medical and nursing students.
1956	Educational Testing Service publishes the MBTI as a research instrument. It is available only to researchers.
1956–1962	Research continues, yielding MBTI Forms C through E.
1962	The first MBTI manual and MBTI Form F are published by Educational Testing Service. It continues to be classified as a research instrument.
1962–1974	Researchers at several universities (e.g., University of California at Berkeley and Auburn University) use the MBTI for various research purposes. Mary H. McCaulley, a clinical psychology faculty member at the University of Florida, collaborates with Myers to further test the MBTI assessment, and to create a data bank for storage of MBTI data.

continued

1975	CPP, Inc. becomes the publisher of MBTI Form F, and makes it available to all professionals qualified to purchase Level B instruments.
1978	Form G (126 items) replaces Form F (166 items) as the standard form of the MBTI, based on a restandardization of the scales.
1980	Isabel Briggs Myers dies.
1985	The second edition of the MBTI manual is published, coauthored by Myers and McCaulley.
1987, 1989	Extended forms of the Indicator, Forms J and K, are published.
1998	Form M (93 items) replaces Form G as the standard form. It is preceded by extensive exploration of alternative item selection and scoring methods and is standardized on a stratified national sample of the U.S. population. The third edition of the MBTI manual is published.
2001	Form Q (144 items) is published, replacing Form K as the standard form for the MBTI Step II assessment. The Step II manual is also published. Form J is retained as a research form.
2008	MBTI® Complete, an online interactive administration and interpretation of the MBTI instrument is published and made available to the general public and professional users.
2009	MBTI Step III form and manual are published, completing Myers' extensive theoretical and research work on type development.

A major reason for the popularity of the MBTI instrument is its relevance in many quite diverse areas—education; career development; organizational behavior; group functioning; team development; personal and executive coaching; psychotherapy with individuals, couples, and families; and in multicultural settings. Because of its long history and prevalence as a research instrument, there are well over 11,000 entries listed in an ongoing bibliography (Center for Applications of Psychological Type, 2008) including more than 1,780 dissertations. The bibliography is updated monthly. The *Journal of Psychological Type* has published 69 volumes primarily devoted to typological research efforts.

Essentials of MBTI Assessment focuses on MBTI Form M, the standard form of the MBTI Step I instrument that replaced Form G in 1998, and MBTI Form Q, the standard form of the MBTI Step II instrument that replaced Form K in 2001. Readers who are interested in the differences between the current standard forms and their predecessors will find this information in the most recent manuals for these instruments. Information about the MBTI Step III assessment, which is referred to only briefly in this work, can be found in the Step III Manual.

In addition to the three MBTI forms, there is a type indicator for children aged approximately 8 through 14, the Murphy-Meisgeier Type Indicator for Children (Murphy & Meisgeier, 2008), which is a revision of the earlier (1987) test. This instrument rests on the same assumptions as the MBTI instrument but uses different items, scoring method, and guidelines for interpretation.

THEORETICAL FOUNDATION OF THE MBTI

The Jung/Myers theory of psychological types is a way of describing and explaining certain consistent differences in the ways that normal people use their minds. The MBTI questionnaire purports to identify these differences through a 93-item, self-administered, paper-and-pencil questionnaire. Results show the respondent's preferences on each of four pairs of opposite categories, which are called dichotomies. The constructs that comprise each of the four dichotomies are broad and multifaceted rather than narrow and unidimensional. That is, rather than tapping a single aspect of the domain covered in a dichotomy, a number of different aspects or expressions are addressed. For example, the Extraversion-Introversion dichotomy is not limited to *socialization*, but includes *activity level, expressiveness*, and other legitimate areas. According to the theory, all eight categories, or preference poles (or at least one or another aspect subsumed under each pole) are used at least some of the time by every person. However, individuals are assumed to have an innate disposition toward one pole of each dichotomy. The goal of MBTI assessment is to accurately identify preferences by sorting respondents into the categories (preferred poles) to which they are already disposed. To elicit preferences between categorical poles rather than the degree of liking for or use of each opposite pole, all items are presented in a forced-choice format. This question format requires the respondent to choose between two mental functions or two attitudes in order to identify which is naturally preferred. If respondents were instead asked to indicate their use of or liking for each pole separately (as with a Likert-type rating scale), preference for one over the other could not be readily distinguished. Forcing respondents to choose between two legitimate ways of using their minds most directly and clearly elicits a preference.

The mental functions and attitudes that are the basic elements of the Jung/Myers theory follow. For ease of understanding the relationship between the Step I dichotomies and the Step II facets, brief descriptions of the facets within each dichotomy are presented immediately following the description of each function or attitude.

The Opposite Functions of Perception: Sensing and Intuition

Sensing perception uses the five senses to become aware of facts and details occurring in the present. When Sensing perception is being used, regardless of whether or not the person prefers Sensing, the perceiver is using the evidence of the senses, focusing on concrete reality, and the gathering of facts and details. The emphasis is on what is known and can be verified. With little conscious effort, a person who *prefers* Sensing has a memory that is specific, detailed, literal, and complete. Without exercising considerable conscious effort, he or she is less likely to give credence and be interested in hypotheses, the unknown, and future possibilities. Sensing is a process that avoids inferences and conjecture and prefers instead to make decisions based on verifiable facts. People who prefer Sensing can experience any requirement to speculate on an unknown future as a pointless distraction from what is important. Intuitive perception looks at patterns, meanings, and future possibilities that are believed to be implicit in current reality.

When Intuition is being used, the perceiver focuses on concepts, ideas, and theories, inferring connections among diverse pieces of information. With little conscious effort, a person who prefers intuitive perception moves quickly and easily from what is present in the here and now to what is implied and possible in the future. Without exercising considerable conscious effort, a person who prefers Intuition has difficulty memorizing and using facts without putting them into an interesting, meaningful context. Intuition is a process that is less experienced and interested in acquiring, remembering, and using facts and details for their own sake. People who prefer Intuition can experience such a focus as inhibiting to their free flow of ideas and as a pointless distraction from what is important.

The Facets of the Sensing-Intuition Dichotomy

Analyses of the multifaceted Sensing-Intuition items of the MBTI questionnaire have identified five pairs of opposite facets: Concrete (S) versus Abstract (N); Realistic (S) versus Imaginative (N); Practical (S) versus Conceptual (N); Experiential (S) versus Theoretical (N); Traditional (S) versus Original (N). These facets are described briefly in Rapid Reference 1.2, immediately following the definitions of the poles of each dichotomy.

The Opposite Functions of Judgment: Thinking and Feeling

Thinking judgment applies specific criteria and principles in a linear, logical analysis of Sensing or Intuitive information. The goal is to arrive at the objective truth

or a reasonable approximation of truth. When Thinking judgment is being used, the person making the judgment takes an objective and dispassionate approach to the available data. With little conscious effort, individuals who prefer Thinking can maintain an objective stance and personal distance by keeping issues of their own and others' personal values and well-being separate from their decision making. Typically, only after a Thinking conclusion has been arrived at can conscious effort be devoted to considering issues of welfare and harmony.

Feeling judgment applies specific, usually personally held values to assess the relative importance of the Sensing or Intuitive information available. When Feeling judgment is being used, there is concern for the impacts and consequences of a decision on individuals or groups of people. The goal of a Feeling decision is to maximize harmony and well-being for people and situations. Without conscious effort, people who prefer Feeling take into account their own and others' feelings, values, and welfare. They use personal connections and empathy with the people affected by a decision to arrive at a conclusion. People who prefer Feeling can readily recognize logical principles and objective criteria for decision making. However, without exercising considerable conscious effort, they avoid using such criteria if harm and disharmony will result.

The terms chosen by Jung and retained by Myers for these two opposites have some unfortunate potential "surplus meanings." Therefore, it is important to recognize that in the MBTI approach, Thinking judgment does not imply the absence of emotion but rather an automatic setting aside of value considerations for the sake of impartiality and objectivity. Feeling judgment does not refer to the experience and expression of emotion. Emotion is separate from Feeling judgment in that emotion is accompanied by a physiological response that is independent of decision making. Thinking types and Feeling types can be equally passionate about a favored position in spite of contradictory evidence that violates certain logical principles (for Thinking types) or certain values (for Feeling types).

Similarly, a Thinking judgment is not more intelligent or correct than a Feeling judgment. In the Jung/Myers theory, Thinking and Feeling describe rational processes that follow laws of reason; that is, they evaluate data using definite criteria—logical principles for Thinking and personal values for Feeling.

The Facets of the Thinking-Feeling Dichotomy

Analyses of the multifaceted Thinking-Feeling items of the MBTI instrument have identified five pairs of opposite facets: Logical (T) versus Empathetic (F); Reasonable (T) versus Compassionate (F); Questioning (T) versus Accommodating (F); Critical (T) versus Accepting (F); Tough (T) versus Tender (F).

The Opposite Attitudes of Energy: Extraversion and Introversion

Extraversion as an attitude directs psychic energy to and receives energy from the outer world of people, things, and action. When in the Extraverted attitude, a person interacts with the environment, receives energy through actively engaging with people and activities, and takes a trial-and-error approach to acquiring new experiences and skills. People who prefer Extraversion tend to think most effectively when interacting with and talking to others and it takes little conscious effort for them to approach others and explore the outer world. Without conscious effort, it is hard for them to think only internally, since they often become aware of what they are thinking only when they are verbalizing. Spending too much time without external activity can result in fatigue and low motivation.

Introversion as an attitude directs psychic energy to the inner world of ideas, reflection, and internal experiences and is energized by operating in that realm. When in the Introverted attitude, a person spends time reflecting on and reviewing ideas and experiences, and observes and thinks about whether or not to interact with new people or try new outside activities. People who prefer Introversion tend to think internally before expressing their thoughts to others. It takes little conscious effort to keep what they are thinking to themselves. Without conscious effort, it is uncomfortable and difficult for them to express their thoughts without first reflecting on them. Spending too little time alone and too much time interacting with people and the environment can result in fatigue and low motivation.

The Facets of the Extraversion-Introversion Dichotomy

Analyses of the multifaceted Extraversion-Introversion items of the MBTI instrument have identified five pairs of opposite facets: Initiating (E) versus Receiving (I); Expressive (E) versus Contained (I); Gregarious (E) versus Intimate (I); Active (E) versus Reflective (I); Enthusiastic (E) versus Quiet (I).

The Two Opposite Attitudes toward the Outside World: Judging and Perceiving

A Judging attitude involves the habitual use of one of the judging functions, Thinking or Feeling, when interacting with the outer world. When a Judging attitude is being used, there is a desire to reach a conclusion (use judgment) and make a decision as quickly and efficiently as possible. Without conscious effort, individuals who prefer a Judging attitude are organized, structured, effectively work within schedules, and begin tasks sufficiently early so that deadlines can be comfortably met. Without exercising considerable conscious effort, they resist

putting off decision making, working without a set plan, and operating in an environment where there are frequent interruptions and diversions.

A Perceiving attitude involves the habitual use of one of the perceiving functions, Sensing or Intuition, when interacting with the outer world. When a Perceiving attitude is being used, there is a desire to collect as much information (i.e., perceive) as possible before coming to a conclusion. Without conscious effort, a person who prefers a Perceiving attitude is flexible, adaptable, and spontaneous when operating in the outside world, works comfortably and effectively when there is pressure of an imminent deadline, and welcomes interruptions and diversions because they stimulate new energy and may provide additional useful information. Without considerable conscious effort, it is difficult for him or her to start on tasks very far in advance of a deadline, operate within set schedules, and be orderly and methodical in pursuing desired goals.

A frequent source of misunderstanding for people with regard to the Judging and Perceiving attitude is knowing that these attitudes describe ways of relating to the outside, extraverted world *regardless of one's preference for Extraversion or Introversion*. People who prefer a Judging attitude behave in a Judging manner while extraverting (extraverting either Thinking or Feeling, whichever they prefer); people who prefer a Perceiving attitude behave in a Perceiving manner while extraverting (extraverting either Sensing or Intuition, whichever they prefer).

The Facets of the Judging-Perceiving Dichotomy

Analyses of the multifaceted Judging-Perceiving items of the MBTI instrument have identified five pairs of opposite facets: Systematic (J) versus Casual (P); Planful (J) versus Open-ended (P); Early Starting (J) versus Pressure-Prompted (P); Scheduled (J) versus Spontaneous (P); Methodical (J) versus Emergent (P).

Rapid Reference 1.2 summarizes the four dichotomies that constitute a four-letter type and indicates their designation as either attitudes or functions. Each dichotomy is followed by a brief description of its five MBTI Step II facets. Like all definitions and descriptions of MBTI preferences, types, and facets, the brief definitions presented here are designed to be neutral and positive in tone, conveying that neither pole of any dichotomy or facet is favored over its opposite.

An individual's Step I preferences can be summarized in a four-letter code, each letter standing for one of the eight preferences, such as ISTJ for Introverted, Sensing, Thinking, Judging or ENFP for Extraverted, Intuitive, Feeling, Perceiving. All possible combinations of preferences yield 16 different types. All 16 types are seen as valid and legitimate ways of being psychologically healthy, adapted, and successful, though their interests, talents, and general outlooks are likely to be quite different.

Rapid Reference

1.2 The Four MBTI Step I Dichotomies and Associated MBTI Step II Facets

The Sensing-Intuition Dichotomy (Functions or Processes of Perception)

Sensing (S)
Focusing mainly on what can be perceived by the five senses.

Intuition (N)
Focusing mainly on perceiving patterns and interrelationships.

The Five Facets of Sensing-Intuition

Concrete
Focus on concrete, tangible, and literal perceptions, communications, learning styles, world view, and values. Trust what is verifiable by the senses, and are cautious about going beyond facts.

Abstract
Focus on concepts and abstract meanings of ideas and their interrelationships. Use symbols, metaphors, and mental leaps to explain their interests and views.

Realistic
Prefer what is useful, has tangible benefits, and accords with common sense. Value efficiency, cost-effectiveness, comfort, and security.

Imaginative
Value possibilities over tangibles and like ingenuity for its own sake. Are resourceful in dealing with new experiences and solving problems.

Practical
More interested in applying ideas than in the ideas themselves and like working with known materials using practical, familiar methods. Prefer modest, tangible rewards over risky opportunities for greater gain.

Conceptual
Like knowledge for its own sake and focus on the concept, not its application. Enjoy complexity and implied meanings over tangible details. Likely to take risks for large potential gains.

Experiential
Trust their own and others' experience as the criterion for truth and relevance and learn best from direct, hands-on experience. Focus more on the past and present than the future.

Theoretical
See relevance beyond what is tangible and trust theory as having a reality of its own. Are future oriented and see patterns and interrelationships among abstract concepts.

Traditional

Like the continuity, security, and social affirmation provided by traditions, established institutions, and familiar methods. Uncomfortable with fads and unconventional departures from established norms.

Original
Value uniqueness, inventiveness, and cleverness to put meaning into everyday activities; enjoy demonstrating their own originality. Believe that sameness detracts from meaning.

The Thinking-Feeling Dichotomy (Functions or Processes of Judgment)

Thinking (T)
Basing conclusions on logical analysis with a focus on objectivity and detachment.

Feeling (F)
Basing conclusions on personal or social values with a focus on understanding and harmony.

The Five Facets of Thinking and Feeling

Logical
Believe that using logical analysis and hard data is the best way to make decisions; focus on cause and effect, pros and cons.

Empathetic
Believe that a decision's impact on people should be primary; focus on important values and relationships; trust own appraisal of what is relevant.

Reasonable
Use sequential reasoning, fairness, and impartiality in actual decision making; are confident and clear about objectives and decisions.

Compassionate
Consider unique and personal needs of individuals rather than objective criteria to be most important in actual decision making; use own values as a basis for deciding.

Questioning
Ask questions to understand, clarify, gain common ground, solve problems, and find flaws in their own and others' viewpoints.

Accommodating
Value harmony and incorporation of diverse viewpoints as more effective ways to gain common ground than questioning, challenging, and confrontation.

Critical
Use impersonal critiquing of ideas, situations, and procedures to arrive at truth and avoid the consequences of flawed ideas and plans.

Accepting
Use kindness and tolerance of others to arrive at a mutually satisfying plan or procedure and are open to a broad range of ideas and beliefs.

Tough
Stand firm on decisions that have been thoroughly considered and critiqued and wish them to be implemented quickly and efficiently.

Tender
Having arrived at a decision or course of action, use gentle persuasion and a personal approach to gain others' agreement.

The Extraversion-Introversion Dichotomy (Attitudes or Orientations of Energy)

Extraversion (E)
Directing energy mainly toward the outer world of people and objects.

Introversion (I)
Directing energy mainly toward the inner world of experiences and ideas.

continued

The Five Facets of Extraversion and Introversion

Initiating
Act as social facilitators at social gatherings, introducing people, connecting those with similar interests, planning and directing gatherings.

Receiving
Prefer to be introduced at social gatherings, dislike small talk, preferring in-depth discussions of important issues with one or two people.

Expressive
Easily tell others their thoughts and feelings, making their interests known and readily confiding in others. Seen as easy to get to know.

Contained
Share thoughts and feelings with a small and select few, rarely confiding in others. Hard to get to know because their reactions are mostly internal.

Gregarious
Enjoy being with others and belonging to groups; have many acquaintances and friends and do not make a sharp distinction between friends and acquaintances.

Intimate
Have a limited circle of close, trusted friends, preferring to talk one-on-one to people they know well; make a sharp distinction between intimate friends and casual acquaintances.

Active
Like direct involvement in active environments, learning best by doing, listening, observing, and speaking rather than by reading and writing.

Reflective
Like visual, intellectual, and mental engagement, learning best by reading and writing rather than by listening and speaking.

Enthusiastic
Talkative and lively, enjoying dynamic flow of energy in conversations; like being the center of attention and sharing who they are by telling stories; catch others up in their enthusiasm.

Quiet
Seem reserved and quiet but often have rich internal responses to what is happening; may have difficulty describing their inner experience in words so may not speak about them.

The Judging-Perceiving Dichotomy (Attitudes or Orientations to the Outer World)

Judging (J)
Preferring the decisiveness and closure that results from dealing with the outer world using one of the judging processes (T or F).

Perceiving (P)
Preferring the flexibility and spontaneity that results from dealing with the outer world using one of the perceiving processes (T or F).

The Five Facets of Judging and Perceiving

Systematic
Like orderliness and systematic methods at work, home, and in leisure activities; value efficiency and advance preparation, and dislike surprises. Enjoy the comfort of closure that comes with making a decision.

Casual
Like taking things as they come, using a leisurely approach to deal with both the expected and unexpected; prefer keeping options open by delaying making firm decisions as long as possible.

Planful
Like making long-range plans for the future, including social events; feel things will not happen as they wish unless they plan in advance.

Open-ended
Like flexible plans and freedom to choose in the moment, dislike being tied down by long-range plans and prior commitments.

Early Starting
Plan for a deadline by starting early and working steadily to completion; dislike the stress of having to work at the last minute.

Pressure Prompted
Work best when pressured by an approaching deadline, effectively bringing together ideas and materials they have been gathering sporadically.

Scheduled
Like the comfort and security of working with routine, established methods both at work and at home; like the predictability this gives their lives.

Spontaneous
Work best with constant variety and freedom to decide which tasks to do at what time; are unmotivated by routine, which feels constraining.

Methodical
Organize and develop detailed plans for a current task, listing and sequencing tasks and subtasks to accomplish the goal.

Emergent
Plunge into a current task without detailed plans, trusting that a solution will emerge regardless of the starting point.

Dynamic Personality Type

Personality type is the result of the interplay of a person's four preferences, represented by one pole of each dichotomy. This interplay is of a dynamic and interactive nature rather than a static or additive one: The whole type is hypothesized to be greater than the sum of the four preferences it encompasses. It is assumed that every individual has access to all eight preference poles—Extraversion *and* Introversion, Sensing *and* Intuition, Thinking *and* Feeling, a Judging attitude *and* a Perceiving attitude. The underlying rationale for this assumption is that each of these functions and attitudes is necessary for psychological adaptation and therefore is present in every person's psychological makeup. However, each is likely to be used with greater or lesser comfort and facility by an individual, depending on its dynamic status within his or her type.

Dynamic status is represented in the Jung/Myers theory as the likely use and development of the system's four functions, or processes (Sensing, Intuition, Thinking, Feeling), which may be dominant (most used, capable of development, and under conscious control), auxiliary (second in use, development, and conscious access), tertiary (third in use and development, and relatively unconscious), or inferior (least used and developed, and primarily unconscious). The theory also specifies that the auxiliary function must be the "other kind" of mental function to that of the dominant; that is, if the dominant function is one of the perceiving functions (Sensing or Intuition), then the auxiliary function must be one of the judging functions (Thinking or Feeling); if the dominant function is one of the judging functions (Thinking or Feeling), then the auxiliary function must be one of the perceiving functions (Sensing or Intuition). By conceptualizing the psyche in this way, an individual has reasonable conscious access to one kind of perception and one kind of judgment so that two critical human endeavors can be directed and controlled.

Both Jung and Myers specified that people who by nature prefer the Extraverted attitude and are most comfortable in that attitude tend to use their dominant, most consciously accessible function when extraverting; people who by nature prefer the Introverted attitude and are most comfortable in that attitude, tend to use their dominant, most consciously accessible function when introverting. Jung, with Myers and Briggs concurring, was also clear that the fourth, inferior function operated primarily in the opposite, less preferred attitude of Extraversion or Introversion. It should be noted that Jung's use of the term *inferior function* was in contrast to his alternative term for the dominant function, which was the *superior function*. The fourth function is "inferior" only in the sense of being last in its accessibility to conscious control.

Jung did not provide clear guidelines regarding the attitude of the auxiliary and tertiary functions. Myers and Briggs amplified and extended Jung's theory by specifying that for sound and healthy adaptation, the auxiliary function operated in the less preferred attitude. In extending Jung's system in this way, they provided for a comfortable and effective way of extraverting and introverting, both of which are necessary for human functioning.

With regard to the attitude of the tertiary function, Myers and Briggs assumed it was opposite to that of the dominant function, as were the auxiliary and inferior functions. This convention was followed in all three MBTI manuals, although there are alternative views regarding the issue. Because there is relatively little theoretical or empirical evidence favoring one attitude or the other as habitual for the tertiary function, its attitude is not specified in this book.

The assumptions of a hierarchy and habitual attitudinal direction are reflected in the designation of each type, for example, Introverted Intuition with Extraverted Thinking. The first term identifies the type's dominant function and attitude whereas the second term specifies the auxiliary function and attitude. The tertiary and inferior functions do not appear in the type code or title of the type, but they are implicit opposites: The tertiary is opposite to the auxiliary in function, and the inferior is opposite to the dominant in both function and attitude.

The hierarchy of functions and associated attitudes is also implicit in the type description of the four-letter type in question. The type description is a detailed narrative that is the primary way that type results are presented. The most theoretically grounded type descriptions (Myers, 1998; Myers et al., 1998) are an orderly presentation of the personality qualities that result from having a dominant function operating in the preferred attitude, an auxiliary function in the less preferred attitude, a tertiary function that is relatively unconscious, and an inferior function that takes the less preferred attitude and is largely unconscious.

Rationale for Determining Type Dynamics

The method for determining type dynamics can seem confusing to people new to type, but it is actually straightforward once the basic assumptions detailed earlier are recognized. The following points reinforce the theoretical assumptions underlying the method:

- If the dominant (first) function is one of the Perceiving pair (Sensing or Intuition), the auxiliary (second) will be one of the Judging pair (Thinking or Feeling), and vice versa.

- The dominant function tends to be used in the preferred attitude of Extraversion or Introversion, thus stipulating that the favorite mental activity operates with the preferred kind of energy.
- The auxiliary function is complementary to the dominant function and tends to be used in the less preferred attitude of Extraversion or Introversion, thus giving a person access to both the other important kind of mental activity (judgment or perception, depending on which is the dominant function) and to the less preferred kind of energy (Extraversion or Introversion, whichever is less preferred). Remember that both perception and judgment are necessary for adaptation—as are both kinds of energy.
- The tertiary function is opposite to the auxiliary. An attitude for the tertiary function is not designated due to differences of opinion in this regard.
- The inferior, fourth function is opposite to the dominant function in both function and attitude (e.g., if the dominant function is Extraverted Thinking, the inferior function is Introverted Feeling).

Recall that the J–P dichotomy identifies which function the type uses in the Extraverted attitude—regardless of whether Extraversion is the preferred attitude or not: A person with a Judging (J) preference Extraverts either thinking or Feeling, whichever of the two is preferred; a person with a Perceiving (P) preference extraverts Sensing or Intuition, whichever one of the two is preferred. Because the Jung/Myers theory specifies the use of the dominant function in the preferred attitude and the auxiliary in the less preferred, it follows that (a) for extraverts the function that is extraverted is the dominant function, and the function that is introverted is the auxiliary function; and (b) for Introverts the function that is extraverted is the auxiliary function, because their dominant function is used in their preferred attitude Introversion.

Rules to Determine Type Dynamics

The assumptions of type dynamics lead to a logical procedure for determining the dynamics of any four-letter type. Remember that the first letter of the code shows the energy preference, the second letter the perception preference, the third letter the judgment preference, and the fourth letter the preference for using judgment or perception while extraverting. We will illustrate the procedure using two types who differ only in their J or P preference, INFJ and INFP:

Rule 1. One of the two middle letters is the dominant function; the other is the auxiliary function. *Example*: For both INFJ and INFP, N or F is dominant; N or F is auxiliary.

Rule 2. One of the two middle letters is extraverted; the other is introverted. *Example*: For both INFJ and INFP, N or F is extraverted; N or F is introverted.

Rule 3. The last letter (J or P) always tells us which of the two middle letters is extraverted. If the last letter is J, Thinking (T) or Feeling (F) is extraverted because Thinking and Feeling are the two judging functions. *Example*: For INFJ, F is extraverted, and applying Rule 2, N is introverted (i.e., $N_i F_e$). If the last letter is P, Sensing (S) or Intuition (N) is extraverted because Sensing and Intuition are the two perceiving functions. *Example*: For INFP, N is extraverted, and applying Rule 2, F is introverted (i.e., $N_e F_i$).

Rule 4. The first letter tells us what the preferred attitude is, either Extraversion (E) or Introversion (I). *Example*: For INFJ, the preferred attitude is Introversion (I) (i.e., $IN_i F_eJ$). For INFP, the preferred attitude is Introversion (I) (i.e., $IN_e F_i P$).

Rule 5. The dominant function is typically used in the preferred attitude of Extraversion or Introversion. *Example*: For $I\mathbf{N_i} F_eJ$, the middle letter that is introverted is N for Intuition. The dominant function of INFJ is therefore Introverted Intuition (N_i). For $IN_e\mathbf{F_i}P$, the middle letter that is introverted is F for Feeling. The dominant function of INFP is therefore Introverted Feeling (F_i).

Rule 6. Following Rule 1, the "other letter" (the one that identifies the auxiliary function) for $I\mathbf{N_i} F_eJ$ is Feeling, which, according to Rule 2, is extraverted. *Example*: The auxiliary function for INFJ is Extraverted Feeling. The dynamics of INFJ are stated as *dominant introverted Intuition with auxiliary extraverted Feeling*. The "other letter" (the auxiliary function) for $IN_e\mathbf{F_i}P$ is Intuition, which, according to Rule 2, is extraverted. The auxiliary function for INFP is extraverted Intuition. The dynamics of INFP are stated as *dominant introverted Feeling with auxiliary extraverted Intuition*.

Rule 7. The tertiary function is opposite to the auxiliary function. We will not specify an attitude for the tertiary function. *Example*: For INFJ, Thinking (T) is the opposite of auxiliary F and is the tertiary function (i.e., $\underset{T}{IN_iF_eJ}$). For INFP, Sensing (S) is the opposite of auxiliary N and is the tertiary function (i.e., $\underset{S}{IN_eF_iJ}$).

Rule 8. The inferior function is opposite to the dominant function and takes the opposite attitude. *Example*: For $I\mathbf{N_i} F_eJ$, Extraverted Sensing is the opposite of dominant introverted Intuition and is therefore the inferior function (i.e., $\underset{S_e}{IN_iF_eJ}$). For $IN_e\mathbf{F_i}P$, Extraverted Thinking is the opposite of dominant introverted Feeling and is therefore the inferior function (i.e., $\underset{T_e}{IN_eF_iJ}$).

Note that INFJ and INFP have three type preferences in common, I, N, and F, so we might reasonably expect that these two types are very much the same. But according to type theory, their dynamics—the nature and direction of flow of energy of their mental functions—are quite different. These differences show up in the behavior of these two types and are in accord with these types' dynamic differences. This important information can be put to practical use in the assessment of their personalities and functioning during the course of counseling and psychotherapy.

To further illuminate the effects of type dynamics, let us contrast the type ENFP with INFP, two types that also have three letters in common. Will these two types be as different in dynamics as the INFJ and INFP? Briefly, ENFP extraverts the preferred perceiving function, N. Since Extraversion is the preferred attitude, N_e (Extraverted Intuition) is the dominant function. ENFP introverts the preferred judging function, F. Since Introversion is the less preferred attitude, F_i (Introverted Feeling) is the auxiliary function. The tertiary function is opposite to the auxiliary, and is therefore T. The inferior function is opposite in function and attitude to the dominant function, and is therefore S_i (Introverted Sensing). The total dynamics for ENFP are $\overset{EN_eF_i\,P}{S_i\,T}$. The total dynamics for INFP are $\overset{IN_eF_i\,P}{S\;T_e}$.

In an important way, INFP and ENFP could be considered more similar to each other than INFP and INFJ because they use their two conscious functions, the dominant and auxiliary *in the same attitudes*. Yet their more unconscious expressions can be expected to be rather different, because for ENFP, Introverted Sensing is the inferior function and Thinking is the tertiary function, whereas for INFP, Extraverted Thinking is the inferior function and Sensing is the tertiary function. This and the differential availability of energy for their respective functions account for some important observable differences between these two types.

Similar differences occur for other types who share middle letters but differ on either J and P, or E and I—or both. Chapter 4 discusses some of the dynamic differences between types, and chapter 6 includes examples of their effects in relation to clinical applications of the MBTI instrument.

You can test your understanding of type dynamics by following the steps in Don't Forget 1.1, which focuses on two other types that differ only in their preference for E or I, ESTP and ISTP. You can also figure out the dynamics of any other type and check your accuracy by consulting Rapid Reference 1.3, which shows each four-letter type, its dynamic designation, and its specified tertiary and inferior function.

A Fundamental Theoretical Distinction

The chief advantage of a theoretically based assessment device is that it provides a cohesive structure within which personality differences can be described,

DON'T FORGET

1.1 Finding the Dynamics for ESTP and ISTP

		ESTP	ISTP
Rule 1:	The dominant function is either:	S or T	S or T
	The auxiliary function is either:	S or T	S or T
Rule 2:	The function that is extraverted is either:	S or T	S or T
	The function that is introverted is either:	S or T	S or T
Rule 3:	The last letter is:	P	P
	So the extraverted function is:	S_e	S_e
Applying Rule 2, the introverted function is:		T_i	T_i
Rule 4:	The preferred attitude is:	E	I
Rule 5:	The function that is used in the preferred attitude is:	S_e	T_i
	The dominant function is therefore:	S_e	T_i
Rule 6:	The function used in the less preferred attitude is:	T_i	S_e
	The auxiliary function is therefore:	T_i	S_e
Rule 7:	The function opposite the auxiliary function is:	F	N
	The tertiary function is therefore:	F	N
Rule 8:	The function/attitude opposite the dominant function is:	N_i	F_e
	The inferior function is therefore:	N_i	F_e

explained, and predicted. However, this puts extra construction and validation requirements on the developer and an added burden on the user, who must understand the theory well enough to apply the instrument appropriately. A fundamental feature of Jung's theory—and therefore the construction and accurate interpretation of the MBTI instrument—is that it postulates qualitatively distinct *categories* rather than more familiar behavioral *traits* that vary along a continuum.

Don't Forget 1.2 shows the differences between MBTI type assessment and contrasting trait approaches. Caution 1.1 lists the dangers of misinterpreting type categories as trait variables. Avoiding these errors is essential for accurate administration (chapter 2) and interpretation (chapter 4) of the instrument.

Basis for MBTI Step II Assessment

From the beginning of the development of the MBTI assessment, Myers planned ultimately to individualize the 16 type descriptions, recognizing that members of the same type could vary widely in the way they experienced and expressed their

Rapid Reference

1.3 Dynamic Characteristics of the 16 Types

Type	Dynamic Name	Tertiary	Inferior
ISTJ	Introverted Sensing with Extraverted Thinking	Feeling	Extraverted Intuition
ISFJ	Introverted Sensing with Extraverted Feeling	Thinking	Extraverted Intuition
ESTP	Extraverted Sensing with Introverted Thinking	Feeling	Introverted Intuition
ESFP	Extraverted Sensing with Introverted Feeling	Thinking	Introverted Intuition
INTJ	Introverted Intuition with Extraverted Thinking	Feeling	Extraverted Sensing
INFJ	Introverted Intuition with Extraverted Feeling	Thinking	Extraverted Sensing
ENTP	Extraverted Intuition with Introverted Thinking	Feeling	Introverted Sensing
ENFP	Extraverted Intuition with Introverted Feeling	Thinking	Introverted Sensing
ISTP	Introverted Thinking with Extraverted Sensing	Intuition	Extraverted Feeling
INTP	Introverted Thinking with Extraverted Intuition	Sensing	Extraverted Feeling
ESTJ	Extraverted Thinking with Introverted Sensing	Intuition	Introverted Feeling
ENTJ	Extraverted Thinking with Introverted Intuition	Sensing	Introverted Feeling
ISFP	Introverted Feeling with Extraverted Sensing	Intuition	Extraverted Thinking
INFP	Introverted Feeling with Extraverted Intuition	Sensing	Extraverted Thinking
ESFJ	Extraverted Feeling with Introverted Sensing	Intuition	Introverted Thinking
ENFJ	Extraverted Feeling with Introverted Intuition	Sensing	Introverted Thinking

DON'T FORGET

1.2 Differences between Trait-Based Assessment and MBTI Assessment

Trait Assessments	MBTI Assessment
Assume universal qualities—people vary only in the amount of the trait possessed	Assumes qualitatively distinct categories—individuals prefer one or the other category
Measure the amount of each trait	Sorts individuals into one or the other category
Scores are expected to be normally distributed—most scores are in the middle	Scores are expected to be bimodal—few scores at the midpoint
Scores are variables that show how much of the trait a person has	Scores are estimates of confidence in the accuracy of the sorting procedure—placement into the category indicated
Interpretive interest is in people at the extremes of the distribution	Interpretive interest is in people near the midpoint, where accuracy of sorting may be in doubt
Assume that behavior is caused by relevant underlying traits	Assumes that behavior is an expression of underlying type preferences
Assume that traits are largely independent of each other	Assumes that the four type preferences interact dynamically to form a whole that is different from the sum of its parts
Traits are usually identified by a single descriptor	Type dichotomies are identified by their two opposite poles
Very high and/or very low scores on a trait can be negative or diagnostic	The numerical portion of MBTI results has no negative or diagnostic meaning

type characteristics. Her unpublished work in this area was the basis for subsequent development of versions of the MBTI instrument that reported scores on subscales or facets of each dichotomy. These scoring systems were published from 1987 through 1997 (Mitchell, Quenk, & Kummerow, 1997; Myers & Briggs, 1996; Quenk & Kummerow, 1996; Saunders, 1987, 1989) representing several revisions and updates and culminating in the current MBTI Step II (Form Q) (Quenk, Hammer, & Majors, 2001). Readers interested in the developmental history of Step II versions can find information in the Step II manual (2001).

CAUTION

1.1 Consequences of Mistaking Type Categories for Trait Variables

- Reading positive or negative meaning into numerical preference clarity indexes—that either more clarity, less clarity, or moderate clarity is better or worse
- Assuming that people with very clear preferences have "more of" the function or attitude than people with less clear preferences
- Believing that greater clarity implies greater skill or maturity of use of a preference
- Inferring that one or the other preference pole of a dichotomy is "better" or "healthier" than the other
- Assessing people from the standpoint of a single norm of psychological health rather than considering what is usual and expected for their type

Rationale Underlying Step II

The Jung-Myers theory assumes that our basic type preferences, or at least tendencies to develop in particular typological directions, are inborn (though not immutable). A child whose developing natural type is validated and encouraged will, hypothetically, develop all or most of the various ways to experience and express that type. But since a totally perfect and affirming environment is unlikely to exist, an individual may adopt strategies, coping devices, useful habits, and interests that tap into one or another aspect of a preference that is opposite to the natural, inborn one. For example, a natural Introvert raised in a family of Extraverts may adopt some socializing and relating behaviors that are consistently rewarded by the family and others. Over time, engaging in those behaviors may feel so natural and comfortable that they become habitual aspects that modify (but do not change the essence of) the person's basic preference for Introversion.

Earlier in this chapter, as you were reading detailed descriptions of the opposite poles of each dichotomy, you probably tried to figure out your own basic type preferences. You may have clearly resonated with all of the qualities associated with one pole of a dichotomy and feel quite confident that it is your preference. It is also possible that you were fairly well described by, for example, Intuition but that there were one or two ways you connected to the description of Sensing. Perhaps in your development of your natural preference for Intuition, you found

it useful, necessary, or rewarding to adopt one or another way of using Sensing. You might then be best described as having *an underlying preference* for Intuition, but habitually using one or two facets of Sensing. MBTI Step II approach identifies and describes such "variations on the theme of type." These variations can be thought of as resulting from a compromise between the individual's natural type and the demands of the environment. As such, Step II information provides a window into the nature of a person's individuality within his or her type and thus vastly increases our understanding of our clients and our ability to provide effective counseling.

Research Foundation of Step II

As mentioned earlier and shown in detail in Rapid Reference 1.2, the Step II method of individualizing type reports rests on the multifaceted nature of the Jung-Myers type constructs.

Versions of the Step II instrument that preceded the 2001 Form Q version used both exploratory and confirmatory factor analytic techniques to identify the subscales or facets. Form Q was developed using both factor analysis and item Response Theory (IRT). In contrast to earlier versions that relied on large samples of convenience, Form Q is based on a much smaller but carefully drawn random sample of the U.S. population aged 18 and over. Sample members responded concurrently to a number of other measures, providing valuable validity information.

RESEARCH FOUNDATION

Throughout its long history, the MBTI instrument has undergone continuous and meticulous research—on its construction, the various ways of estimating its reliability, and the abundant and varied studies regarding its validity in diverse areas of interest.

Construction of Items and Scales

Theoretical requirements were primary in the development of items and construction of the four MBTI scales. Items ask about simple surface behaviors and attitudes that are designed to reflect the presence of an underlying preference for one or the other mental function (S or N; T or F) or attitude (E or I; J or P). Because the goal was to identify slight as well as clear preferences on each dichotomy, items were not worded extremely. Because using logically opposed wording on some items could engender adverse social desirability (e.g.,

"convincing" versus "unconvincing"), opposite choices were designed as "psychological equivalents" that would be meaningful to people holding the preference in question (e.g., "convincing" versus "touching"). The major concern in scale construction was to achieve maximum accuracy in the placement of the midpoint separating the poles of each dichotomy, since the goal was to sort people into categories rather than measure the amount of a trait. Although accurately separating the poles of the bipolar categorical Step II facets was also a concern, identifying a specific single midpoint for the facet scales was not possible or deemed justified because of the brevity of the facet scales (5–9 items). A *Midzone* score was therefore defined as the three scores at the center of the 11-point distribution of each facet scale. Evidence supporting the midzone concept comes from consistently similar descriptions by individuals who score in this category on each of the 20 facets. The specificity of descriptions by people scoring in each midzone is in contrast to the kinds of statements made by many respondents with slight preference clarity indexes on the Step I questionnaire, such as, "I do both," "I don't have a preference," I'm not sure," and the like. There are therefore 3 categories identified in Step II profiles and reports: scores of 2-5 to the left of the midzone, midzone scores of 0 or 1, and scores of 2-5 to the right of the midzone. As will be seen in chapters 2, 3, and 4, item wording and scale construction have an impact on administration, scoring, and interpretation of both steps of the MBTI instrument and they are discussed further in those contexts.

Norms

Norms are appropriate for trait measures but inappropriate in a type-based instrument. Norms are not reported for MBTI Step I. The Step II report provides interpreters with the average range of facet scores for people who are the same type as the respondent, a measure that has limited usefulness. (Of greater value for Step II interpretation, particularly for counseling clients, is the "Polarity Index" discussed in chapter 6, which assesses the consistency with which a client shows clear preferences across all 20 Step II scales). For Step I interpretation, type tables are used to report the frequency and percent of each of the 16 types in a sample of interest. To draw meaningful conclusions about the frequency of the types in a particular sample, an appropriate base population is used for comparison. For example, if one wishes to know which types, if any, are over- or underrepresented among Ph.D. psychologists, the comparison base population would be holders of the Ph.D. degree in a wide range of disciplines; if interest was in the types of college students who are likely to seek personal counseling, the appropriate base

population would be a general sample of college students. The statistic used to show over- and underrepresentation of types is called a self-selection ratio (SSR), and type tables that show SSR data are called selection ratio type tables (McCaulley, 1985). The SSR, also referred to as the Index of Attraction, is calculated by dividing the percentage of a type in the sample of interest by the percentage of that type in the base population to obtain a ratio. Ratios greater than 1.00 indicate overrepresentation of the type relative to the base population, ratios of less than 1.00 show underrepresentation of the type, and ratios around 1.00 reflect about the same representation as the base population. The statistical significance of SSRs is estimated using a chi-square technique. For example, research on educationally oriented leisure activities for each of the 16 types (DiTiberio, 1998) reported an SSR of 2.64 ($p < .01$) for INFJs for the category Writing and an SSR of 0.45 ($p < .05$) for this same type for the category Watching Sporting Events; ISTJs showed an SSR of 1.21 ($p < .01$) for Watching Sporting Events and an SSR of 0.52 ($p < .01$) for Writing. Thus a leisure activity that is quite attractive to INFJs is significantly unattractive to ISTJs, and one that significantly attracts ISTJs is significantly unattractive to INFJs. (See Appendix A for an example of a Selection Ratio Type Table for a large sample of counselors.)

Type tables for different careers typically "make sense" when one considers that people try to choose work that will maximize their opportunities to exercise their preferences. For example, a type table of librarians and another of writers and authors both showed that all of the Intuitive types were overrepresented,with INFJ having the highest SSR for both librarians (4.28) and writers (6.20), and all of the Sensing types were underrepresented (Schaubhut & Thompson, 2008). The "sense" of these results follows from descriptions of Sensing and Intuition.

Reliability

Internal consistency and test-retest reliability have been reported for each scale of the MBTI instrument and vary somewhat depending on the nature of the sample studied. Coefficient alpha results available for the largest and most general sample of male and female adults ($N = 2{,}859$) tested with Form M are .91 for the E–I and T–F scales and .92 for the S–N and J–P scales (Myers et al., 1998). Test-retest reliabilities are given for each scale separately and for whole four-letter types. Because type is hypothesized to remain stable over the life span, this latter measure of reliability is the most important. Test-retest reliabilities vary somewhat with the interval between administrations and also with the age of sample members; younger samples tend to have somewhat lower reliabilities, a result in accord with the theory, which hypothesizes that type develops over the life span and is more

likely to be incompletely developed in younger individuals. The developmental hypothesis and its empirical verification are relevant to both administration and especially interpretation of type to clients in different ages and stages of life. With a 4-week interval between administrations, using the most general sample available ($N = 258$), 66% reported all four letters the same and 91% were the same on three out of four preferences. Detailed information on these estimates and additional reliability information can be found in the most recent MBTI manual (Myers et al., 1998).

For MBTI Step II results, both test-retest and internal consistency reliability have been reported for the 20 facet scales using the national sample used to develop the Step II instrument as well as a sample of adults and another of college students. Alphas range from .52 for the Practical-Conceptual scale in the student sample to .87 for the Initiating-Receiving scale in the adult sample. Consistent with Step I Form M internal consistency reliabilities (and for the same hypothesized reason), reliabilities of the Step II facet scales are lower for the college sample than for the adult sample. Test-retest reliabilities of Step II continuous scores for a sample of adults and a sample of college students, both tested 30 days apart, indicated that coefficients for the adult sample ranged from .56 for the Questioning-Accommodating scale to .90 for the Initiating-Receiving scale, and for the student sample ranged from .55 for Methodical-Emergent to .78 for Initiating-Receiving. Stability of Step II scores for the three categories (scores of 2–5 toward the left pole of the scale; midzone scores of 1 or 0; scores of 2–5 toward the right pole of the scale) were also examined. For the adult sample, scores ranged from 84% remaining in the same category for Planful–Open-ended to 57% for Questioning-Accommodating; for the student sample, scores ranged from 72% for Initiating-Receiving, Enthusiastic-Quiet, and Logical-Empathetic to 50% for Questioning-Accommodating (Quenk, Hammer, & Majors, 2001). Details of Step II reliability information as well as inferences about its practical meaning for specific client samples can be found in the Step II manual.

Validity

A theory-based test must demonstrate that it adequately reflects the theory it purports to represent. For the MBTI assessment this entails demonstrating that the preference poles of each dichotomy correspond to Jung/Myers definitions and, most important, that the dynamic interactions hypothesized by Jung and Myers occur. Years of correlational and behavioral research demonstrate the correspondence of the eight preference poles to theoretical prediction (Hammer, 1996; Myers & McCaulley, 1985; Myers et al., 1998). A variety of statistical methods

have been utilized in MBTI research, including the SSR method described earlier. Correlational research looks at one dichotomy at a time and treats MBTI data as though they varied along a continuum, a method that contradicts the MBTI assumption of qualitatively distinct categories. These and other studies of individual dichotomies do not address the dynamic aspect of the MBTI assessment, although they can provide useful information for practitioners about some of the behavioral traits that develop as a result of the exercise of underlying type preferences. The most fruitful lines of research look at the behavior of whole types and dynamic qualities of those types. Several studies supporting the dynamic nature of the Jung-Myers theory have been reported (Mitchell, 2006; Myers et al., 1998). Chapter 6 applies some of the results of studies of whole types and type dynamics to clinical issues.

The validity of the MBTI Step II assessment has been explored in several ways, including a confirmatory factor analysis, which showed strong evidence of the construct validity of the facet scales. A wide variety of measures have been used to demonstrate the validity of the 20 Step II scales. These include correlations with the California Psychological Inventory (CPI) (Gough & Bradley, 1996), Adjective Check List (ACL) (Gough & Heilbrun, 1983), and self-descriptions of attitudes and behaviors related to health, work, stress, coping, relationships, and values (Quenk, Hammer, & Majors, 2001). Studies of earlier forms of the Step II instrument looked at the relation between Step II facets and the Fundamental

Rapid Reference

1.4 The Myers-Briggs Type Indicator Standard Form M

Author: Isabel Briggs Myers and Katharine C. Briggs

Publication date: 1998

What the instrument provides: Identification of Jungian personality type

Age range: Approximately 12 years and up

Administration time: 15–25 minutes

Qualifications of examiners: Completion of a course in the interpretation of psychological assessments and measurement at an accredited college or university or successful completion of CPP-licensed MBTI Certification Program, which after January, 2009, includes training in MBTI Step II assessment.

Publisher: CPP, Inc.
1055 Joaquin Road, 2nd Floor
Mountain View, CA 94043

Rapid Reference

1.5 The Myers-Briggs Type Indicator Standard Form Q

Author: Katharine C. Briggs and Isabel Briggs Myers

Publication date: 2001

What the instrument provides: Scores on 20 facets of the four MBTI Step I dichotomies.

Age range: 18 years and up

Administration time: 25 to 35 minutes

Qualifications of examiners: Certified to administer and interpret Step I (*and* after January, 2009, completion of an approved Step II training program).

Publisher: CPP, Inc.

Interpersonal Relations Orientation—Behavior (FIRO-B) (Fleenor & Van Velsor, 1995), behavioral descriptors (Harker & Reynierse, 1999), and Benchmarks scales (Van Velsor & Fleenor, 1997). Based on these and other studies, there is strong evidence for the validity of the Step II facet scales. Note that Step II results do not lend themselves to being arrayed in type table format as is common for Step I data, so this way of appraising the validity of the Step II facets is not available.

COMPREHENSIVE REFERENCES

MBTI Manual: A Guide to the Development and Use of the Myers-Briggs Type Indicator (Myers et al., 1998) provides the most complete and detailed theoretical, psychometric, and research information on the MBTI Step I assessment as well as practical guidance for its use in five areas of application.

MBTI Step II Manual: Exploring the Next Level of Type with the Myers-Briggs Type Indicator Form Q (Quenk, Hammer, & Majors, 2001) provides complete, detailed theoretical, psychometric, and research information on the MBTI Step II instrument, including its applications in both counseling and organizational environments.

MBTI Applications: A Decade of Research on the Myers-Briggs Type Indicator (Hammer, 1996) contains contributed chapters summarizing the reliability and validity of the MBTI instrument as well as research that was completed in the decade after publication of the 1985 MBTI (Step I) manual.

CAPT® Bibliography for the Myers-Briggs Type Indicator is a comprehensive, frequently updated bibliography of published and unpublished work on the MBTI assessment. It is available on the Web for free keyword searching at CAPT.org. The *Center for Applications of Psychological Type*™ (CAPT) also houses a library of type resources at its offices in Gainesville, Florida.

The Journal of Psychological Type, formerly published quarterly, is devoted entirely to research and application articles and reviews on psychological type. The journal was first published

in 1978 as an annual. It is now available as a monthly online journal. (Contact CAPT for subscription information.)

Rapid References 1.4 and 1.5 provide basic information on the MBTI Step I and Step II instruments and their publisher.

TEST YOURSELF

1. **Why are forced-choice questions appropriate for the MBTI instrument and a Likert-type scale inappropriate?**
2. **What are three consequences of treating type preferences as though they were behavioral traits?**
3. **Why are both poles of a dichotomy described in neutral or positive ways?**
   (a) to promote self-esteem in self-critical people
   (b) to communicate the legitimacy of opposite ways of being
   (c) so that people will be motivated to identify their preference
   (d) both b and c
4. **According to type theory, type preferences are**
   (a) habits that are learned through interacting with the environment.
   (b) innate dispositions that develop over time.
   (c) more clear in young people than in mature adults.
   (d) likely to change at midlife.
5. **What is the self-selection ratio useful for?**
   (a) comparing trait approaches and type approaches to personality
   (b) determining which types will be successful in different careers
   (c) showing whether some types select and other types avoid a particular career
   (d) all of the above
6. **Why are correlational studies of the MBTI instrument limited?**
   (a) They can only look at one scale at a time.
   (b) They violate the assumption of dichotomies.
   (c) They cannot test the dynamic aspect of the instrument.
   (d) All of the above.
7. **When respondents read item choices on the MBTI questionnaire, why might they be likely to say "But I do both of those!"?**
8. **What do type preferences reflect?**
   (a) what you are able to do under pressure
   (b) what you are comfortable doing under pressure

continued

(c) what feels natural and comfortable when there is no pressure
(d) all of the above

9. Why is the wording of some MBTI items not logically opposite?

10. What was the E–I dichotomy of the MBTI assessment designed to do?

(a) measure how extraverted or introverted a person is
(b) determine whether a person has a preference for Extraversion or Introversion
(c) both a and b
(d) neither a nor b

11. The dominant function for ENFP is

(a) Extraverted Feeling.
(b) Extraverted Perceiving.
(c) Extraverted Intuition.
(d) Introverted Intuition.

12. Type theory postulates that everyone uses each mental function and attitude at least some of the time. True or False?

13. MBTI Step II results show a respondent's individual way of expressing his or her type. True or False?

14. Which of the following is *incorrect* regarding Step II facet scores?

(a) The 11-point score range includes 2–5 to the left of the center point, 2-to 5 to the right of the center point, and a midzone score of 0 or 1 on either side of 0.
(b) Each of the 5 facets within a dichotomy reflects one relatively narrow aspect of the dichotomy.
(c) Myers anticipated Step II Form Q by developing an early version.
(d) Step II Form Q is based on a large sample of counselors and educators.

15. What rationale underlies development of the MBTI Step II instrument?

Answers: 1. Likert scales elicit *degree* of rather than the required *preference for*; 2. Seeing one pole as "healthier" than the other; thinking the preference clarity index indicates "how much" preference a person has; defining one pole as a deficit of the other; 3. d; 4. b; 5. c; 6. d; 7. Both poles are adaptive and therefore people use both some of the time; 8. c; 9. Logical opposites can yield socially undesirable choices so *psychological* rather than logical equivalence is used; 10. b; 11. c; 12. True; 13. True; 14. d; 15. Facet results represent a compromise between innate preferences and environmental demands.