

Learning Agility: A New Model and Measure

WORKING PAPER

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January 2016

Introduction

The demands placed on today's leaders require them to be able to swiftly and skillfully adapt to changing and dynamic environments. Leaders are facing challenges that are no longer black and white, or technical in nature, but instead grey, nuanced and adaptive. When faced with the former, traditional learning and problem solving strategies work – success is based on knowing the answer and executing. But when the right answer or course of action is not apparent, what do we do? In these situations leaders must learn quickly and flexibly deploy a range of solutions until one is found that works. Said another way, leaders must be have **Learning Agility** in order to quickly and accurately determine the best course of action. But what does it mean to be an agile learner? How can a leader become more learning agile? Researchers at Teachers College, Columbia University have investigated these questions resulting in some important conclusions for anyone who wishes to thrive in the face of change.

What you will learn from this article:

1. Learning agile individuals have disciplined learning habits in each of the following areas:
 - a. *Feedback seeking*: they seek information from others about their performance
 - b. *Information seeking*: they stay up-to-date by reading newspapers and other publications
 - c. *Performance risk-taking*: they take on tasks that have the possibility of failure
 - d. *Interpersonal risk-taking*: they admit mistakes, ask for help, and speak up
 - e. *Collaborating*: they work cooperatively with others and learn in groups
 - f. *Experimenting*: they tinker and play with new ideas to test what will work
 - g. *Reflecting*: they take time to understand and make meaning from their experiences
2. Learning agile individuals are able to use the lessons they learn with speed and flexibility.
 - a. *Speed*: they quickly acclimate to new tasks, people, and environments
 - b. *Flexibility*: they change course easily and adjust to the demands of the situation
3. Learning agile leaders tend to have a learning mindset, are more open to new experiences, and possess a greater tolerance for ambiguity.
4. Learning agile leaders are not:
 - a. *Rigid*: stuck in certain ways of doing work
 - b. *Reactive*: volatile, impulsive, or reckless (at worst)
 - c. *Defensive*: insecure about critical feedback or afraid to admit mistakes or ask for help
5. Learning agile behaviors are viewed positively by others; managers seem to value employees who are less defensive and who are open to feedback; peers and direct reports appear to value those who are more reflective and open to change.

What is Learning Agility?

Learning agility describes how people approach learning from experiences. Leaders who learn from experience with speed and flexibility are able to move fluidly through different work tasks and career experiences. We have long known that an important difference between successful people and those who falter is their ability to make meaning from their experiences.

This understanding has created a revolution in terms of how we view leadership potential. In the past, we have tried to predict an individual's potential for future success based exclusively on past performance and on demonstrated skills and abilities. However, this approach is inherently flawed. Seminal work from the Center for Creative Leadership showed us that leaders derail when they refuse to let go of entrenched patterns of behavior or do not recognize and react to the differences across situations. We also know that fundamentally different behaviors are required at different levels in organizations and that the behaviors that are effective at one level do not necessarily lead to success at the next. Moreover, the rate of change within organizations is greater than ever and thus leaders are constantly required to adapt. When discussing the issue of long-term potential then, an individual's current skill-set is of secondary importance to their ability to learn new knowledge, skills, and behaviors that will equip them to respond to future challenges. As a result, our focus must shift to finding and developing individuals who are continually able to give up skills, perspectives, and ideas that are no longer relevant, in favor of new ones.

We now know that one important indicator of leadership potential is **Learning Agility**; that is, the willingness and ability to reconfigure activities quickly to meet changing demands in the task environment. Individuals who are high in learning agility engage in behaviors at work that not only help them to perform but also to learn. Such individuals master the balance between efficient execution in known and familiar situations and thoughtful learning in unfamiliar ones. This balance allows them to quickly and flexibly adapt to a range of challenges over time.

While our understanding of Learning Agility is growing (see the *Further Reading* section for examples), research is still in its infancy and there is much work to be done. It is imperative that we continue to evolve our understanding of the concept and seek better clarity around what learning agility is, how it can be measured, and what learning agile individuals do that differentiates them from others. Through a better understanding of learning agile behavior, individuals can unleash their own potential.

It is this possibility that inspired researchers at Teachers College, Columbia University to create the **Learning Agility Initiative (LAI)**, with a mission to increase our understanding about how learning agile individuals behave at work.

Exploring the Burke Learning Agility Inventory

Our research supports the view that learning agility is a mind-set and corresponding collection of practices that allow leaders to continually develop, grow, and utilize new strategies that will equip them for the increasingly complex problems they face in their organizations. We have developed the **Burke Learning Agility Inventory (BLAI)** to measure what we have found to be the seven main facets of learning behavior (*Feedback seeking, Information gathering, Performance Risk taking, Interpersonal Risk Taking Collaborating, Experimenting, and Reflecting*) and two facets of agility (*Speed and Flexibility*), which in combination form learning agility. Of these facets that enable one's learning agility, there are at

least three impede it (*Rigidity, Reactivity, and Defending*). A brief description of each facet follows below.

Learning Agility 'Enablers'

- **Feedback seeking.** The first component of learning agility involves a desire to improve work performance by asking others for others' evaluations. By seeking feedback about performance, individuals can fine tune how they are doing their work and also to compare their current status against their future goals.
- **Information gathering.** In some ways, this component of learning agility can be thought of as “book smarts.” Learning agility requires individuals to stay up-to-date with current topics, trends and knowledge. In doing so, learning agile individuals tend to read – A LOT! They also stay current by attending trainings and conferences, seeking more education, and becoming members of professional organizations.
- **Performance risk taking.** Another core component of learning agility involves venturing into unknown territory and putting oneself 'out there' to try new things. Learning agile individuals are pioneers - adventurous and comfortable with progressive risk - risk that leads to opportunity, not thrill seeking. They volunteer for jobs and roles where success is not always guaranteed, and, in fact where failure is a possibility. Learning agile individuals learn continuously and amass confidence by stretching themselves outside their comfort zone, resulting in a cycle of perpetual failure and success.
- **Interpersonal risk taking.** The hardest, but often most important, part of learning is being able to ask for help, admit mistakes, or speak up about difficult issues. Learning agile individuals do not let their fear of shame, blame, or humiliation get the best of them. Instead they dig down deep to be brave enough to speak out about things that most people would rather avoid discussing – all in an effort to grow and learn.
- **Experimenting.** In trying to find what will work, learning agile individuals often apply a scientific method to testing new approaches. By using data to evaluate effectiveness, they come up with evidence-based conclusions to create plans for how to operate. It is equally as important to find out what *does not* work as what *does* work, so “failure” is often embraced as a stepping stone toward a better outcome.
- **Collaborating.** In today's business environment, no one individual holds the answer to any question. Learning agile individuals embrace working with others and seek to create positive work environments where information is shared easily across teams. In many cases, they speak less in meetings in order to promote sharing by others.
- **Reflecting.** Simply having new experiences does not guarantee that one learns from those experiences, and learning agile individuals seem to know this. They are hungry for feedback and spend focused energy processing information so as to better understand their own assumptions and behavior. They generate deeper insight into themselves, others, and problems as a result.

Learning Agility 'Derailers'

There is a growing awareness of behaviors that inhibit optimal job performance or stall careers for long periods. Such behaviors can be called “derailers.” When it comes to learning agility, one such derailers is to avoid learning opportunities when they arise. Derailers are often based on fears, such as a fear of humiliation, embarrassment or shame, loss of control, or failure. It is natural to feel this way, and some organizations do things to either promote or attenuate these emotions, but learning agile individuals persist in the face of these fears, in the pursuit of learning and growing.

- **Rigidity.** In some cases, people rely on what has worked in the past in order to plan for the future. This can cause individuals to get stuck in a pattern of behavior that may not be the best course of action. Especially when a major shift of one sort or another occurs, an over-reliance on “tried and true” strategies can cause individuals to overgeneralize events instead of to see important nuances.
- **Reactivity.** Failure, change, and other disruptions can cause a great deal of discomfort and anxiety. The way an individual approaches and reacts to uncomfortable situations can promote or undermine a positive outcome. Sometimes individuals can be impulsive or even explosive in handling such experiences which can lead to hasty decision-making. While speed is one component of learning agility, learning agile individuals make decisions quickly but not recklessly.
- **Defending.** Being open to experience is fundamental to learning. It is no surprise then that we found that individuals who remain closed or defensive when challenged or given critical feedback tend to be lower in learning agility. High learning agile individuals seek feedback, process it, and adapt themselves based on their new-found understanding of themselves, situations, and problems.

Each of these facets provides insight into the type of behaviors and actions that are employed by individuals high in learning agility. Learning agile individuals seek opportunities for growth and are able to process these experiences in order to learn. They are open to new experiences, seek challenges and are willing to introduce new ideas and question ‘norms’. Moreover, they are able to remain present in challenging situations by performing and adapting ‘on the fly’. Finally, learning agile individuals understand that experience alone does not guarantee learning; they take time to reflect, seeking to understand *why things happen*, in addition to *what happened*.

It is important to acknowledge that although each of these facets is important, it is not likely (or perhaps even desirable) that a person can exhibit all of them simultaneously. However, it is apparent that the more that these components are in an individual's repertoire the more likely the individual will be considered to be learning agile.

Developing the Burke Learning Agility Inventory

Currently, the BLAI is undergoing a thorough process of both construct and criterion-related validity testing. Initial results from earlier exploratory studies suggest preliminary support for convergent and divergent construct validity. In measures of workplace personality, learning agility scores were correlated with openness ($r = .579$, $p < .001$) and extraversion ($r = .410$, $p < .01$), need for stability ($r = -.53$, $p < .01$), conscientiousness; ($r = .437$, $p < .001$), agreeableness; ($r = -.278$, $p < .05$). In relation to learning goal orientation, learning agility scores were positively correlated with learning orientation

($r = .432$, $p < .001$) and negatively correlated with performance orientation ($r = -.389$, $p < .001$).

In terms of criterion-related validity, a study performed on a sample of 130 candidates for executive-level positions in the wealth management industry found a positive correlation of .42 ($p < .05$) between self-rated learning agility scores and a rating of the probability of success in an executive-level position (as evaluated by an executive recruitment firm). This indicates initial support for a relationship between learning agility and high-level performance in executive leadership roles.

Studies are underway to further test the current inventory in regard to construct and criterion-related validity. Results will be available in the forthcoming months. See Appendix B for a detailed report of the BLAI development procedure and results.

Conclusions

Learning Agility is an important and sought after 21st Century capability. The willingness and ability to learn from experience not only influences the extent to which we grow as individuals but also how we solve problems as well as relate to, and are perceived by others. Ultimately, our ability to continuously learn and adapt will determine the extent to which we thrive in today's turbulent times.

We can all endeavor to be more learning agile. We can take more risks and challenge the status quo, seek feedback and reflect on lessons learned. And we need to try to do all of this while resisting the temptation to become defensive, rigid or reactive, especially in the face of criticism or other challenges.

The extent to which we are able to do this will not only have an impact on who we are today, but also on who we can become tomorrow. We will always face new challenges, problems, and issues. What separates the *once successful*, from the *still successful* is the ability to meet these challenges head on and take these lessons forward.

Further Reading and Resources

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About the Authors



W. Warner Burke, PhD is the E. L. Thorndike Professor of Psychology and Education and a founder of the graduate programs in social-organizational psychology at Teachers College, Columbia University. Originally educated as a social-organizational psychologist (Ph.D., University of Texas, Austin), Dr. Burke is currently engaged in teaching, research, and consulting. He teaches leadership and organization change and consultation. His research focuses on multi-rater feedback, leadership, organization change, and learning agility. Dr. Burke's consulting experience has been with a variety of organizations in business/industry, education, government, religious, health care systems, and professional services firms.

Prior to his move to Teachers College, Dr. Burke was Professor of Management and Chair of the Department of Management at Clark University. Prior to the Clark assignment, Dr. Burke was an independent consultant from 1974 to 1976. For eight years he was a full-time professional with the NTL Institute for Applied Behavioral Science, where he was Director for Executive Programs and Director of the Center for Systems Development (1966-1974). For eight years beginning in 1966, he also served as the Executive Director of the Organization Development Network.

Dr. Burke is a Fellow of the Academy of Management, the Association for Psychological Science, and the Society of Industrial and Organizational Psychology. He has served on the Board of Governors of the Academy of Management and the American Society for Training and Development (now Association for Talent Development), and he is a Diplomate in industrial/organizational psychology, American Board of Professional Psychology. From 1979 to 1985 he was Editor of the American Management Association's quarterly, *Organizational Dynamics*, and from 1986 to 1989 he originated and served as Editor of the *Academy of Management Executive*. Dr. Burke is the author of more than 150 articles and book chapters on organization development, training, change and organizational psychology, and conference planning and author, coauthor, editor, and coeditor of 20 books. His latest (2014) book is *Organization Change: Theory and Practice, 4th Edition* (Sage).

Among his many awards are the Public Service Medal from NASA, the Distinguished Scholar-Practitioner Award from the Academy of Management, Lifetime Achievement Awards from the OD Network and Linkage, and the Distinguished Professional Contributions Award from the Society of Industrial and Organizational Psychology. Starting in January 2016, he is the editor of the *Journal of Applied Behavioral Science*.



Kate Roloff, PhD, is the Research Coordinator for the Learning Agility Initiative and Adjunct Faculty in the Department of Organization and Leadership at Teachers College, Columbia University.

Kate is also the Director of Applied Research at J3Personica where she is leading a project on developing a model of the effectiveness of executive-level Physician Leaders. Kate has extensive experience in designing and executing research methodologies ranging from small-scale labs experiments to cross-sectional longitudinal designs. Her scholarly interests include learning in organizations, especially at the individual and team levels, as well as topics related to leadership and organizational justice. Her dissertation work was on how perceptions of leader authenticity affect fairness judgements in decision-making processes.

Kate has a PhD in Social Organizational Psychology from Columbia University. She received her B.A. in psychology and administrative science from Colby College and an M.A. in psychology from Boston University. She has been published in the *Academy of Management Annals* and *Journal of Organizational Behavior*, as well as in the medical journals *Cancer* and *American Journal of Health Behavior*, in addition to many book chapters on team learning, negotiations, and positive organizational scholarship.

Prior to her academic career, Kate worked in academic medicine at Yale University School of Medicine and Boston University Medical School on topics such as the psychosocial breast cancer research, behavioral women's health, and gender differences in cardiac chest pain. In addition, she worked as a Research Associate at Harvard Business School where she wrote teaching cases for MBA and EMBA classrooms on the Minnesota Children's Hospital and the Veteran's Health Administration, as well as Leading Change at Simmons Mattress Company, among others, and performed research on team and organizational learning as well as a longitudinal study of the careers of the Harvard Business School class of 1996.



Adam Mitchinson, MA, is completing his PhD in Social-Organizational Psychology at Teachers College, Columbia University and also works in industry as a Talent Management & Organizational Development consultant. Adam's primary research interests are in the area of Leadership, Leadership Development & Organization Change. He has published articles in the *Journal of Applied Social Psychology* and *Industrial & Organizational Psychology*, including a contribution to a special issue on Learning Agility. His dissertation explores how leaders can manage competing organizational demands while maintaining the trust of their followers.

Working at a Fortune 100 Financial Services Company & a Global Fashion Brand, Adam has overseen a number of initiatives that improve performance at the individual, team and organizational level. This includes the development and execution of strategies related to employee assessment, learning & development, performance management, and organizational culture & change. Adam is an experienced leadership coach and loves working with teams to improve effectiveness.

APPENDIX A. Sample Items

Learning Items

Below, you will find a list of behaviors that people perform at work. Thinking back over the past 6 months, please consider how often you have engaged in each behavior in your professional life.

1 2 3 4 5 6 7
 Not at all Occasionally Very Frequently

Items	Dimension
Seek feedback from my manager about my performance	Feedback Seeking
Read trade journals, newspaper articles, books, or other sources to stay informed	Information Seeking
Volunteer for assignments or projects that involve the possibility of failure	Performance Risk Taking
Bring up problems and tough issues with others	Interpersonal Risk Taking
Work with colleagues from different backgrounds or job functions to share perspectives	Collaborating
Experiment with unproven ideas by testing them out	Experimenting
Stop to reflect on work processes and projects	Reflecting

Agility Items

Below you will find a list of behaviors that can describe how people perform their work. Please evaluate how well each statement describes how you engage your work.

1 2 3 4 5 6 7
 Not at all Somewhat Very Much

Item	Dimension
Consider many different options before taking action	Flexibility
Readily grasp new ideas or concepts	Speed

APPENDIX B. Instrument Development

To develop an inventory of informal learning behaviors, we reviewed the relevant domains of the literature to complete a list of constructs to be included. Once the constructs were selected from a review of the literature, five to six items were developed according to a definition for each construct. Items were written to specify distinct but related behaviors that are observable demonstrations of the construct according to its definition. Where applicable, we adapted items from the literature that have been shown to demonstrate the construct of interest (e.g., feedback seeking).

The pool of items was examined to identify ambiguous wording, double-worded items and redundant items. As a result of this analysis, 12 items were discarded and 8 were rephrased. In addition, ten items were re-written to reduce the potential for socially desirable responses. In all, the resultant pool consisted of 36 items. The items were both positively and negatively worded to reduce social desirability bias. The learning behavior items are measured on a scale of 1 (not at all) to 7 (very frequently) in response to the following statement: "Thinking back over the past 6 months, please consider how often you have engaged in each behavior in your professional life." The agility items are measured on a scale of 1 (not at all) to 7 (very much) in response to the following statement: "Please evaluate how well each statement describes how you engage your work."

This initial pool of items was tested in two samples: a convenience sample of online respondents and a sample of working professionals. The results of these two exploratory studies yielded initial support for the inventory; however, the negatively worded items clustered together and did not factor appropriately into the expected sub-dimensions. As a result of this and other issues, the literature was revisited to further clarify the conceptual constructs. The items were reorganized into 9 conceptual categories and new items were written to address any gaps in content. In total, four to five items were included in each construct after the research team wrote and discussed each item as demonstrating a behavior that fit the definition of the construct. The items were all positively worded. In sum, thirty-eight items were included with four items for each of the learning behaviors and five items each for speed and flexibility. Sample items are contained in Appendix A.

This inventory was then tested in a sample of working professionals in order to assess the psychometric properties of the new items.

- **Procedure.** Participants for this study received an email through a list serve that included alumni of executive education programs at a large, mid-Atlantic leader development organization. They self-selected to participate in the research. Participants were invited to complete an online questionnaire through a link in an email. They were able to complete the questionnaire at their convenience on a computer of their choosing.
- **Sample.** The inventory was tested with a cross-section of participants from executive education programs at an organization that specializes in leadership development in the Mid-Atlantic. In total, 393 participants completed the study materials and were 57% male with the largest proportion being between the ages of 35-44 years old (27%), followed by 45-49 (19%), 50-54 (18%), and 55-64 (18%). Most of the participants held jobs in the corporate sector (57%) and represented various roles in the organization including manager (24%), director (19%), professional staff (13%) and executive level (11%). See Table 3 for a summary of participant demographics.

Table 2. Participant Demographics

	N	(%)
Age		
18-24	4	(1.0)
25-34	48	(12.2)
35-44	104	(26.5)
45-49	76	(19.3)
50-54	72	(18.3)
55-64	69	(17.6)
65+	20	(5.1)
Gender		
Male	223	(56.7)
Female	170	(43.3)
Job Function		
Accounting	7	(1.8)
Administration/General Mgmt	84	(21.4)
Consulting	33	(8.4)
Coaching	16	(4.1)
Strategy	5	(1.3)
Academician	5	(1.3)
Human Resources/HR	40	(10.2)
Information Systems	32	(8.1)
Marketing/Sales	23	(5.9)
Operations/Production	38	(9.7)
Research & Development	21	(5.3)
Training & Development	44	(11.2)
Other	45	(11.5)
Organizational Level		
C-Level/President/Chairman/EO	43	(10.9)
Executive/Senior/Group VP	24	(6.1)
Vice President	25	(6.4)
Director	73	(18.6)
Manager	96	(24.4)
Adjunct/Faculty	6	(1.5)
Owner	14	(3.6)
Consultant	13	(3.3)
Owner/Consultant	19	(4.8)
Professional Staff	51	(13.0)
Contract Employee	12	(3.1)
Student/Intern	2	(0.5)
Other	15	(3.8)
Role		
Individual Contributor	104	(26.5)
Manager	70	(17.8)
Manager of managers	52	(13.2)
Senior level manager	71	(18.1)
Executive level	64	(16.3)
Other	32	(8.1)
Sector		
Corporate	225	(57.3)
Education	37	(9.4)
Government	36	(9.2)
Non-profit	25	(6.4)
Other	70	(17.8)

To provide initial psychometric support for the factor structure created based on the theoretical model, a series of confirmatory factor analyses (CFA) were performed by randomly splitting the sample into two groups. We tested the 9-factor model which included 38 items. Scholars have suggested that using a CFA approach is more appropriate than using an exploratory factor analysis (EFA) approach due to the fact that we had a theoretically-derived a priori model which was based on an instrument refining process from previous testing of earlier versions of the inventory. In order to test our model, we randomly split the sample into two groups. In doing so, we were able to test our model with the first group and confirm the pattern of results with the second group. This enhances our ability to determine that support for the model is due to the psychometric properties of the instrument as opposed to due to random chance.

- **Factor Structure.** We evaluated the fit of the model by conducting a CFA using Mplus version 7. To do so, we considered five different statistics to interpret model fit: the χ^2/df ratio, the comparative fit index (CFI), the root-mean-square error of approximation (RMSEA), and the standardized root-mean-square residual (SRMR). Each of these fit indices has a conventionally accepted range of values that indicates the degree of the model fit. The χ^2/df ratio of about 2.0 is generally considered to be a good fit, while ranges of above .90 for CFI, below .06 for RMSEA, and below .08 for SRMR indicating good fit.
 - The results of our split-sample CFA is presented in Table 3. Both models indicate good model fit based on the indices presented. For Sample 1 (n=197), the χ^2/df ratio was less than, but close to 2. In large samples such as this, the chi-square test will likely be significant, as was the case here, $\chi^2=1085.48$, $p<.01$. The other fit statistics suggested a satisfactory fit of the model, CFI=.90, RMSEA=.06, and SRMR=.06. For Sample 2, (n=196), the χ^2/df ratio was less than, but close to 2, $\chi^2/df=1.69$. Again, the chi-square test was significant, $\chi^2=1060.84$, $p<.01$. The other fit statistics suggested a satisfactory fit of the model, CFI=.92, RMSEA=.06, and SRMR=.05.

Table 3. Results of Confirmatory Factor Analysis

Sample 1	n	χ^2	df	χ^2/df ratio	CFI	RMSEA	SRMR
9-factor	197	1085.48	629	1.73	0.90	0.061	0.057
Sample 2	n	χ^2	df	χ^2/df ratio	CFI	RMSEA	SRMR
9-factor	196	1060.84	629	1.69	0.92	0.059	0.048

- **Reliability.** The result of the reliability analysis for each of the subscales is presented in Table 4. Each sub-scale demonstrated satisfactory reliability, with all sub-scales achieving a .70 reliability or higher. For the feedback seeking dimension, the mean was 4.75 ($SD=1.54$), $\alpha = .87$. For the information seeking dimension, the mean was 5.55 ($SD=1.60$), $\alpha = .81$. For the performance risk taking dimension, the mean was 4.93 ($SD=1.46$), $\alpha = .88$. For the interpersonal risk taking dimension, the mean was 5.31 ($SD=1.29$), $\alpha = .78$. For the collaboration dimension the mean was 5.44 ($SD=1.35$), $\alpha = .88$. For the experimentation dimension, the mean was 4.90 ($SD=1.42$), $\alpha = .85$. For the reflection dimension, the mean was 5.01 ($SD=1.45$), $\alpha = .83$. For the flexibility dimension, the mean was 5.24 ($SD=1.17$), $\alpha = .81$. And, for the speed dimension the mean was 5.64 ($SD=1.13$), $\alpha = .85$.

Table 4. Means, Standard Deviations, and Reliability Statistics

Construct	M	SD	Alpha
Feedback Seeking Seek feedback from my manager about my performance.	4.75	1.54	.865
Information Seeking Read trade journals, newspaper articles, books, or other sources to stay informed.	5.55	1.60	.807
Performance Risk Taking Volunteer for assignments or projects that involve the possibility of failure.	4.93	1.46	.876
Interpersonal Risk Taking Bring up problems and tough issues with others.	5.31	1.29	.775
Collaborating Work with colleagues from different backgrounds or job functions to share perspectives.	5.44	1.35	.878
Experimenting Experiment with unproven ideas by testing them out.	4.90	1.42	.847
Reflecting Stop to reflect on work processes and projects.	5.01	1.45	.830
Flexibility Consider many different options before taking action.	5.24	1.17	.812
Speed Readily grasp new ideas or concepts.	5.64	1.13	.854