Workshop: New Training Strategies

Effectively Preparing People for Cultural Adjustment and Transitions

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Definition - U-Curve (& W-Curve)

A model designed to describe the emotional adjustment process of cross-cultural sojourns over time. The 'U' shape suggests sojourner’s emotional well-being begins positively, dips to a negative state, and eventually returns to positive levels of satisfaction. It is commonly depicted in illustrated form as follows…
5 Assumptions About the U-Curve

1. Is the most common pattern of adjustment

2. Applies to various kinds of sojourners

3. Applies to various lengths of stays abroad

4. Has typical time periods (e.g. crisis at 3-6 mo.)

5. Is backed by research
“You can't expect to meet the challenges of today with yesterday's tools and expect to be in business tomorrow.” – Unknown
The question is not whether the U-curve model can be effective. The question is whether the U-curve model is the most effective.
The challenge is not finding alternatives to the U-curve.

The challenge is letting go of our dependence on the U-curve.
Flow for our Workshop

The U-Curve in Academia

The U-Curve in Practice

Alternatives
The U-Curve in Academia

A brief history of...

The original study
Testing of the model
Top conceptual criticisms
Dismissal in Academia

The Original Study

Lysgaard (1955) studying 198 Norwegian Fulbright students:

Adjustment as a process over time seems to follow a U-shaped curve: adjustment is felt to be easy and successful to begin with; then follows a 'crisis' in which one feels less well adjusted, somewhat lonely and unhappy; finally one begins to feel better adjusted again, becoming more integrated into the foreign community. (1955: 51)
Note that...

- There was no illustration of this U-curve
- It was a cross-sectional, retrospective design
- Some interviewees were reflecting on experiences of up to three years prior
- Three different groups of students were studied (<6 mo. → 6-18 mo. → 18+ mo)

Lysgaard recognized the limitations of his study. The U-curve was a hypothesis, needing further testing.

Yet the model quickly became popular and grew to be central to adjustment theory.
Empirical Testing of the Model

54 years of testing...

• Church (1982):
  
  *U-curve support is: 'weak, inconclusive and over-generalized'*(542).

• Black & Mendenhall (1991):
  
  *The lack of methodological rigor in many of the studies makes generalizing their results problematic.‘*

  *a rejection or acceptance of the U-curve by scholars or cross-cultural trainers would be premature.’*(231)*

• 1991-2006 Studies
  Additional testing, more challenges
  Furnham & Bochner – When is a U not a U?

  ...And still no conclusive support
Top Conceptual Criticisms

- Initial Euphoria (Honeymoon)
- Simplicity of the Model
- General Applicability & Usefulness
- One Pattern Assumption
The U-curve has been on-trial now for almost 40 years, and the time is long overdue to render a verdict. Despite its popular and intuitive appeal, the U-curve model of sojourner adjustment should be rejected. (Ward, 1998: 290)
The U-Curve in Practice

Research around…

How the model is being used
Trainers’ attachment to the model
Perceived strengths of the model

About the Study…

Ongoing Use of the Model

The U-curve continues to being used frequently in practice

– 94% had used the U-curve model in CCT
– Nearly half employ it in 91-100% of their programs.
Perceptions of the Model

Trainers generally perceive the model to be
• *accurate* and *valuable*
• *important* and *somewhat effective*

Trainers rated the initial euphoria as being the most accurate
Confidence in the Model

The degree to which trainers noted the limitations of the model varied considerably.

Low Confidence: Each model has its limits, several expatriates say they never go through these stages / The U-curve is a gross exaggeration or simplification...the graphed line can look as different as there are numbers of people.

Mid Level Confidence: This is one depiction of an adjustment cycle that (most) people will experience / This U-curve process most likely happens to every expat

High Confidence: Certain phenomena like honeymoon...are inevitable. / It happens to everyone and it WILL happen to you! / Everyone goes through this ...

Many trainers were not aware of the origins or controversy behind the model.
Attachment to the Model

• “It works so easily, it’s hard to imagine not using it.”

• “Just because we can’t prove the U-curve, doesn’t mean it doesn’t happen to most people. After all, we can’t prove God exists…”

• “Taking away the U-curve from trainers would be like taking away a hammer from a guy who’s job it is to drive nails.”
Reported Purpose & Strengths

Purpose
- Show ‘normalness’ of adjustment challenge
- Enable more realistic expectations
- Introduce and develop coping strategies

Strengths
- Easy to understand
- Clear visual
- Helps to make sense of experience
The U-Curve in Practice

Dangers in Using the Model…

The Photocopying Effect
The Triple-Threat

The Photocopying Effect

Illustrations of *varying complexity* often accompanied descriptions of the model.

Important details of the model have been lost or distorted over the years…
The Photocopying Effect

Also, the controversy...

Many sources made *little or no acknowledgement of the controversy* or limitations of the model.

![Bar chart showing document samples by qualification level and type.](chart.png)
The Photocopying Effect

One-third of the sources suggested the U-curve model has backing at academic level.

False validation:

- ‘Research shows’ that most people ‘ / ‘The model is well researched…”
- ‘Studies show …/ “Studies indicate’ / ‘Many studies have been done’… /
- ‘It has been the subject of an extensive literature’ / Reference only to supportive studies

Suggested Agreement by Experts:

- ‘Sociologists, anthropologists and psychologists have divided the culture shock or fatigue phenomenon into stages. They say… /’
- ‘Experts speak of’ / ‘Most scholars agree’.
Danger in Using the Model

The Triple-Threat:

- **Field**
  - Highlights work from infancy of field
  - Exposes research rigor challenges

- **Trainers**
  - Undoes depth/complexity of our work
  - Challenges trainer credibility

- **Trainees**
  - Sets false expectations
  - Gives too basic understanding of adjustment
Ethical Presentation of the U-curve

The U-Curve should be presented recognizing the:

- Lack of supporting research & dismissal by some theorists
- High degree of variability and individuality
- Variety of patterns possible and documented in studies
- Variability in the initial period of euphoria
- Limited applicability to all sojourners

What the model does and does not cover
The Old Process

Show U-Curve

Describe ‘Symptoms’ and/or Stages

Provide ‘Coping Strategies’ and Suggestions to Ease Culture Shock
A New Process: 4 Components of Transition Training (Berardo)

- Experience The WHAT
- Understand The WHY
- Apply The WHAT NOW
- Personalize The HOW
A New Process: 4 Components of Transition Training (Berardo)

- Experience transition challenges
- Address ‘culture shock’ assumptions
- Recognize the emotional complexity of transitions

- Acknowledge the multitude of variables
- Personalize to (type of) sojourner, culture,Generate with instead of generalizing TO

- Develop coping strategies that are detailed, personalized and specific

- Understand The WHY

- Apply The WHAT NOW

- Personalize The HOW

- Experience The WHAT

Instead of the symptom laundry list, focus on likely transition stress for that individual
- Using: past transitions / stressful events, family
A Sample Process

- Working in Unfamiliar Surroundings
  - Experience
  - Apply
  - Personalize
  - Start. Stop. Continue.
  - Hats Reworn, Torn and Born
  - You, Me & Transition Makes 3

- 4 Rs of Culture Change
  - Understand
  - Understand
  - Personalize
  - Hats Reworn, Torn and Born
  - You, Me & Transition Makes 3

- Applying The WHAT NOW
- Understanding The WHY
- Personalizing The HOW
- Applying The WHAT NOW
Alternative Exercises
4 Components

- Working in Unfamiliar Surroundings (Brandt)
- Noticing change exercise
- Non-dominant hand writing (Ting-Toomey)
- Tied-hands exercise
- A different route…
- Application / Date of Birth
- Paper Animals
- Watch switching
- Change in the Eyes of Others (Quotes)
- Barnga (Thiagi)
- Culture Transition Changes
- Stories and Vignettes
- Toe-to-toe standing exercise
- Assumption sort
Alternative Exercises
4 Components

- The 4 R’s of Culture Change (Berardo)
- Analogies:
  - Rollercoaster, Merry-Go-Round (disorientation)
  - Changing of Seasons, the Remodel (for transition)
- Different Days, Different Ways (LaBrack)
- Story metaphor: Oh, the Places You’ll Go, Wizard of Oz
- Models
  - William Bridges’ Transition Model
  - Pierre Casse’s
  - Kim’s Stress-Adaptation-Growth Model
  - Jung’s Process of Individuation
- A Day in the Life of…
- Island Dance
- Hat’s reworn, torn and born (Berardo)
Alternative Exercises
4 Components

**Personalize The HOW**
- Worksheet: 5 fears, 5 excitements (LaBrack)
- What would you do? (Culture specific incident studies)
- Transition Reflection
- Change by Choice or Chance (Berardo)
- You, Me & Transition Makes 3 (Berardo)
- Visualizing Culture Shock
- Myself in Stress
- Circles of identity (and how this will shift/change)
- Rahe-Holmes list of stressors: Ranking and connect to past stressors

**Apply The WHAT NOW**
- Start. Stop. Continue strategies
- SMART Stress Management Action Planning
- Coping strategies sort and prioritize (on index cards)
- Continuities, connectors and comforts
- Support Network Mapping
- The Power of the Subconscious Exercise
Workshop Wrap-up

Thank you!
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Email kate@culturosity.com for a copy of today’s materials