

# Perception and Judgement

## Isabel Myers, measuring type, and the MBTI Step III Manual



**Peter Geyer**

Isabel Briggs Myers,  
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**MBTI Step III Manual:**  
*Exploring personality  
development using  
the Myers-Briggs Type  
Indicator instrument*

CPP (2009)

**Peter Geyer** (INTP) takes an historical interest in the origin and development of the MBTI, particularly the nature and meaning of its questions.

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The Myers–Briggs Type Indicator is Isabel Briggs Myers’s chosen method for articulating her ideas about C G Jung’s theory of psychological types. Notwithstanding the ultimate publication of her book *Gifts Differing* and the booklet *Introduction to Type*, it’s the ‘Indicator’ (as she called it) that contains her core intellectual exertions. MBTI Manuals can also be seen in this context in a particular way, given that the 1962 *Manual* is her only solo output.

Essentially, this is what Myers called *perception* and *judgement*, and their development. Items, scales, and the rules that govern their interpretation were the core components. Measurement was her text, rather than writing, at least as far as the public expression of her thought was concerned.

It’s unclear when this intellectual exercise started, and how much input came from Isabel’s mother, Katharine Briggs. From interviews and other available comments made by Isabel, it appears that Katharine’s influence was mostly in the early days.

An early *Report Form*, dated from 1946 and provided in the first thesis using the MBTI (Laney 1949), shows a breakdown of results on each scale into subcategories (**Figure 1**). These subcategories were later called *clusters*, and have parallels with the facets or subscales available in the Step II Forms K and Q.

Although the MBTI was developed in the context of a normal psychology of individual differences, from an unspecified time early in its development it contained items or questions that focused on impediments to type development—i.e., what stops you from being you. From people’s responses to her items, Myers developed patterns or scales.

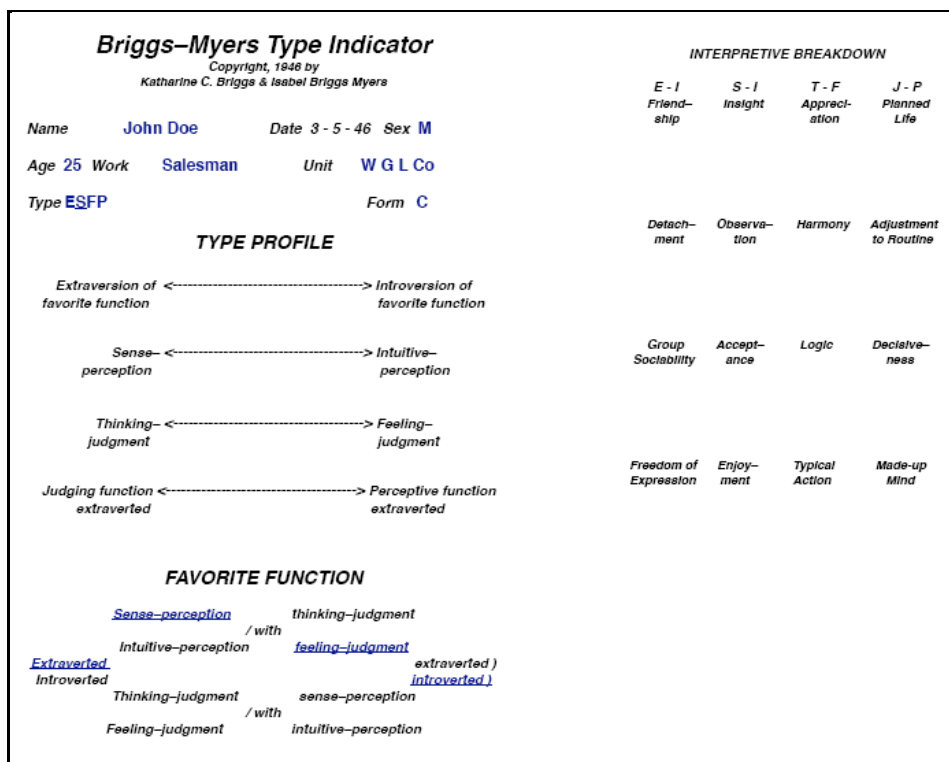
This approach seems similar to what has occurred with instruments such as the CPI and MMPI, where researchers have identified new scales from patterns of question responses. For example, someone who answers a number of questions in a particular way may be found to have a particular issue or behavioural tendency. Isabel Myers developed her own system and her own way of identifying their meaning. Obviously this is something that takes a lot of time and thought and testing.

It was this aspect of the MBTI that triggered the collaboration between Isabel Myers and Mary McCaulley in 1969. On a whim, McCaulley had given the MBTI to a group of clinical outpatients. Their responses to their results led her to contact Myers, who asked for the answer sheets so she could do some further research and interpretation.

In early 1970, in the context of collaboration, she wrote to McCaulley outlining four levels of interpretation of the MBTI:

1. Forms E and F, keys for scoring type, and the *MBTI Manual*
2. Reported Sufficiency Indices
3. Interpretive breakdown
4. Interpretations of particular patterns of response

Levels 2 to 4 were restricted, and people were not to know that these existed. Indeed, according to Myers, officially they did not exist, implying that Educational Testing Service, the then publisher of the MBTI (as a research instrument), was unaware of them. In essence, these levels were private research, based on Indicator results, which Myers had used from time to time as a kind of consultant—although to whom and why isn’t made clear in the *Manual*, nor in the information I possess.



The existence of these items was a close-kept secret

Figure 1: BMTI report form, showing breakdown of scales

Source: Laney (1946)

E—I	S—N	T—F	J—P
group sociability	imagination	firmness	spontaneity
detachment	theorizing	logic	planning
friendship	concreteness	warmth	organization
freedom of expression	acceptance	faith	application
amusability	intellectuality	harmony	obligation

Confidence	Strain	Stamina	Miscellaneous
shyness	resistance	reaction to difficulty	enjoyment
worry	defensiveness		appreciation
dependence	stubbornness		made-up mind
evidence of failure	cynicism		
indecision			

Figure 2: Isabel Myers's interpretive breakdown for MBTI Form F

Source: Isabel Myers and Mary McCauley, documents and audio tapes (private collection, Peter Geyer)

**Figure 2** shows the broad nature of these scales and patterns in Form F. All the items are involved, and a very small number are both in the preference categories and the other scales. The non-type items are also mixed in with the type items so as not to attract attention—unlike Form G, where extra items were placed at the end.

The interpretive breakdown was one aspect of a larger project, which was to develop a computer-based scoring system for Myers’s method as part of a program to provide this information to counsellors, including a Manual. An interpretive report was to be provided for the counsellor’s information and for use with clients.

For a number of reasons (chief among them the death of Isabel Myers in 1980), the project remained incomplete, although the computer program was used in research and the production of various reports. For many years, Mary McCaulley regularly

reported at APT International conferences on results from the CAPT databank, using the clusters for type preference as context. **Figure 3** shows these clusters, which have a natural similarity to the Step II facets. (The language has been edited for reasons of space.)

The existence of these items and their purpose, together with the scales associated with them, was a close-kept secret. At accreditation or qualifying programs, these were referred to as ‘research questions’ by presenters who probably knew little more than that.

Some MBTI users became familiar with Otto Kroeger’s interpretation of unscored items on Form G, based on what he had learned from his encounters with Isabel Myers, as well as subsequent research. His insights and method were not to be taught to others. The current MBTI Step I, Form M, intentionally has none of these items.

Extraversion—Introversion	Sensing—Intuition	Thinking—Feeling	Judging—Perceiving
<p><b>Group Sociability</b></p> <p>E Sociability in gatherings of friends or strangers.</p> <p>I Socialising with one person at a time or small, intimate groups, rather than large gatherings.</p> <p><b>Detachment – Involvement</b></p> <p>E Active participant rather than observer.</p> <p>I Observer rather than active participant.</p> <p><b>Friendship – Intimacy</b></p> <p>E Wide circle of friends and active attempt to liven up social relationships.</p> <p>I Close to relatively few people: intimacy with a few rather than acquaintance-ship with many.</p> <p><b>Freedom of Expression</b></p> <p>E Free expression of feelings, opinions.</p> <p>I Reserve in expressing personal feelings.</p> <p><b>Amusability</b></p> <p>E Active enjoyment of contacts with others.</p> <p>I Freedom from the burden of having to make small talk.</p>	<p><b>Imagination</b></p> <p>S Realistic, practical approach.</p> <p>N New ideas; play of imagination.</p> <p><b>Concreteness</b></p> <p>S Dealing with real, tangible things, where results can be seen and measured.</p> <p>N Working with verbal or mathematical symbols at an abstract level; appreciate creativity even if results are not immediately visible.</p> <p><b>Theorizing</b></p> <p>S More at home in situations firmly grounded in facts and experience, that involve little or no theory.</p> <p>N Seeing how facts fit together and what they may mean, with only a passing interest in the facts themselves.</p> <p><b>Intellectuality</b></p> <p>S Action that leads to practical results. In education, applied fields which lead to directly useful accomplishments.</p> <p>N Intellectual interests. Enjoy learning, value university and postgraduate training.</p> <p><b>Acceptance</b></p> <p>S Do things in accepted and traditional ways; go with facts as they are.</p> <p>N Maintain independent views; want to see changes in many areas.</p>	<p><b>Firmness</b></p> <p>T Tough-minded: things on merits, act accordingly. Hard to bend when situation calls for gentleness.</p> <p>F Easy-going and gentle. Hard to be firm when situation calls for firmness.</p> <p><b>Logic</b></p> <p>T Impersonal, logical approach in making decisions. Forget, in matters of personal concern, that things one truly cares about are important, logical or not. May need to be reminded to factor in what one cares about in making decisions.</p> <p>F Care more about human aspects than logic of the situation when making judgements. Forget about logical consequences in matters of immediate personal concern. Benefit from reminders to consider consequences of actions prompted by feeling.</p> <p><b>Harmony</b></p> <p>T Questioning and critical. Enjoy a good argument and let the chips fall where they may. Disagree inwardly much of the time without necessarily saying so. (+ E–I)</p> <p>F Happiest when there is harmony, much preferring to agree than disagree. Want harmony so strongly that may sometimes sacrifice own views and interests.</p>	<p><b>Spontaneity</b></p> <p>J Live comfortably with schedules, routines and systems.</p> <p>P Enjoy the variety of frequent changes; want time free and uncommitted.</p> <p><b>Planning</b></p> <p>J Enjoy arranging for activities ahead of time; like to have plans settled.</p> <p>P Prefer not to cross a bridge before reaching it.</p> <p><b>Organizing</b></p> <p>J Organise a job before starting it.</p> <p>P Start projects without feeling a need to organise beforehand.</p> <p><b>Application</b></p> <p>J Learn more by persistent effort than by exploring what engages curiosity. Real satisfaction out of finishing what’s started.</p> <p>P Learn more by exploring what engages curiosity than by persistent effort. Work best at jobs requiring a variety of activities. or adaptability to handle changes, emergencies.</p> <p><b>Obligations</b></p> <p>J Orderly, systematic.</p> <p>P Casual, easy-going.</p>

**Figure 3:** Isabel Myers’s rules for MBTI Form G clusters

Source: CAPT research papers (some text has been adapted)

The Step III project was Mary McCaulley's final achievement. She died just after the agreement to revise and complete the work was made between CPP, CAPT, and the MBTI owners, Peter and Katharine Myers, in 2003. The goals of the project are listed in the *Step III Manual* as:

1. determining areas for the reconstruction focus
2. evaluating alternative scaling methods
3. exploring ways to score for additional aspects of type functioning
4. evaluating alternative report statements
5. constructing suggestions for improving type functioning
6. producing a report

The description of these goals, how they were set out, and their outcome are clearly written and presented.

The *Step III Manual* is the written outcome of that project: a guide to the instrument, its development and interpretation. The instrument can be completed online or on paper, and generates a report directed at the client. It doesn't give out a type result, but describes, in plain language, suggestions for improving type functioning.

Training in Step III is restricted to those who meet strict criteria for qualifications and experience, which excludes the vast majority of Step I and Step II users. This is disappointing from an intellectual and curiosity perspective, but entirely appropriate—it is, after all, intended for those who are professional counsellors. Reading the *Manual* confirmed my personal ineligibility; there's so much to know.

Perhaps restrictions such as a time limit or refresher training could be applied to those qualified or certified to use Step I or Step II.

The *Manual* briefly describes the research process of examining the material left by Isabel Myers, and the challenge of understanding and interpreting her method. The computer program developed 40 years ago was rewritten for a more modern age. The Form F items were re-examined to check their relevance to a different era, and extra items were developed and tested. Methods of measuring and scoring were investigated.

Examination of a Step III question booklet shows that its questions are in fact a combination of the complete Forms F and Q, the latter including the complete Form M.

The *Manual* defines 'Sufficiency' scales as an attempt to measure the extent to which an individual's *total* development (including their *type* development) is, or is not, sufficient to meet what is demanded of that person. Developmental scales focus on narrower and more specific aspects of development. A combination of these provide Step III patterns, which lead to Rules and the triggering of them to provide statements in the Interpretive Report.

The Step III Interpretive Report provides a *Developmental Personality Description, Developmental Statements & Suggestions, and Suggestions Based on Unique Facet Patterns*. An Interpreter's page includes a type code result: otherwise, no type information is provided.

Rules, rather than scores, are important for Step III. This can be something like a theme from the language of the questions, but it also has to do with possible behavioural outcomes of answering a particular group of questions. The Form G cluster breakdown provides some example rules for the usual scales at Figures 3 and 4, once again edited for space reasons.

As a manual for a psychological instrument, information on reliability and validity is presented, including correlations with the usual instruments. Issues with some of the smaller scales and patterns are discussed.

The focus on results from questionnaires, as opposed to a narrative interpretation, provides some interesting insights. For instance, in commenting on the kinds of suggestions based on Step II patterns, the *Manual* states that:

... among ISTPs ... a pattern comprising Expressive, Conceptual, Critical, and Early Starting facets is associated with a statement describing an alienating, critical style. In contrast, a pattern among ISTPs consisting of Active, Imaginative, Critical, and Early Starting is associated with a capacity of showing warmth to others. (p 40)

Something to reflect upon.



## Rules, not scores, are important for Step III

## Type as a positive psychology

The *Manual* identifies Isabel Myers's work as 'positive psychology', antedating Martin Seligman and others by several decades, and seeks to identify her work with this movement.

I think this is a mistake. Not because her ideas aren't positive in intent, because they clearly are. In an apocryphal statement, she said to Mary McCaulley: 'You psychologists tell people what's wrong with them ... I want to tell people what's *right* with them.' She avoided pathologies, and even this questionnaire is meant to be supportive rather than critical or pathological, and better expressed as *a* positive approach to psychology.

How much comparative labels like 'positive psychology' apply to type is another issue. As mentioned earlier, at a basic level, type can claim to be a positive psychology because it attests that the differences it identifies are good, by definition. Step III continues in that vein. It doesn't operate from a presumption of pathology or personality deficiency.

However, it's unclear whether such a perspective is sufficient to align type with the positive psychology movement of Seligman and others; and I wonder whether it would be a good idea to do so, in any case. Like emotional intelligence, positive psychology is a 'highly contested construct', so no core agreement on what it entails. Farnborough and Hart observe that

... we could be blindsided by enlarging the positive and diminishing the negative as EI [emotional intelligence] seems to encourage us to do. (2008)

Realism doesn't seem to come into it.

The social researcher and writer Barbara Ehrenreich attests that cultural promotion of positive thinking hasn't helped the USA much, particularly in considering it the only perspective to take in life, and that the only alternative is to be negative (2009).

This seems fairly reasonable, in that relentlessly taking one perspective on life can blind you to important and relevant facts and other, more viable alternatives.

Ehrenreich has previously inveighed in similar fashion against 'hope', in the context of her own experience of breast cancer, recently mentioned in newspaper reviews and magazine supplements in Australia.

Lest her position be considered simply an aggrieved polemic, Ehrenreich's argument and evidence is bolstered by others. Daniel Nettle points out that whatever 'happiness' is, it isn't the same for everyone, and a positive outlook isn't necessarily a requirement (2005). Barbara Held is one of many academic commentators who have criticised positive psychology promoters for denigrating the gifts of critique and social change, as well as the importance of complaint in everyday life (2002, 2005).

There appears to be an element of accepting and succeeding within the current system, therefore advising against seeking social change, that goes with these positive ideas, which isn't all that much different from a standard perspective.

Part of this critical response to positive psychology has to do with overarching claims made by Seligman himself about his movement and his disparaging of other perspectives such as humanistic psychology, a position not universal in his group (e.g. Peterson 2004). Eugene Taylor has called to attention Seligman's consistent inability to address this subject in his writing (2001), a theme also taken up by Rathunde (2001).

To be fair, Seligman's not the only psychologist who appears to find it difficult to walk across a campus to have a chat with history or sociology faculty members about things he wants to write and speak about. Perhaps it would have been better to look beyond the attractiveness of a title or label to see what it contains before claiming an association, however tenuous. Personality is a complex business and it has its own share of fads to which even the brightest are not immune (Best 2006).

This may be part of a general writing perspective. Myers's insight and wisdom are referred to throughout the text which, whatever the truth of these statements and my own position on whether they might be true, made me very uneasy. I would have preferred more objective language. It is, after all, a *Manual*.



Isabel Myers: 'I want to tell people what's *right* with them'



## The theory of type

The *Manual* provides an excellent and succinct explanation of Myers's presumptions about type. This is valuable in itself as the intent of the author and the purpose of her questionnaire are often misconstrued, or even ignored.

There are three levels of differentiation, for instance, in what is described as a theory of perception and judgement:

- Firstly, it's necessary to differentiate the *process of perception* from the *process of judgement*. This means knowing (not necessarily with the language labels) that they require separate and distinct mental activities, and that they are two different, independent processes.

If an individual is undifferentiated in this way, perception and judgement are one process and occur simultaneously.

- Secondly, there's differentiation between a *pair of opposites*. This means knowing that sensing is different from intuition, and that thinking is different from feeling.
- Thirdly, there's differentiation *within a function*. This means the nuanced use of a function or attitude so that it is expressed in different ways.

Although core principles are dealt with in the example I've given, nowhere in this section, nor in the *Manual* as a whole, are the perspectives of Beebe or Grant mentioned. The third part of differentiation would seem to be relevant to Beebe's idea, for instance.

Perhaps this is because one of the authors, Naomi Quenk, explicitly stated at the 2007 APT International conference that she did not consider Beebe's model Jungian—a reasonable proposition if you're a classical Jungian, or if your psyche is at variance with Beebe's propositions.

At any rate, reading this section made me think circumspectly about my own development, and the *Manual* as a whole made me reconsider some of my views on type development as a whole. It seems a rare thing and not particularly general.

## Conclusions

This is a welcome publication. It goes to some lengths to explain the broad process involved in the research, although in less depth than I would like. That's not so much a criticism as a reflection of the amount of information that I like to have on anything of personal interest.

The *Manual* can be used as a general text to provide extra information on the nature of the types, even if you're not a counsellor or wouldn't otherwise qualify for the certification course. Certainly, I'm pleased that it's part of my personal library.

The publication of this *Manual* also emphasises the need for a comprehensive publication of Isabel Myers's ideas and methods: an intellectual biography of sorts. The lack of such necessary research is possibly due to a focus on applications of type, something Myers herself emphasised. It may even be that something like that hasn't really been considered.

Strictly speaking, Isabel Myers was no philosopher. But there is a distinct theory or interpretation of personality in her work, implicit in what she arrived at. Allen Hammer, for instance, has compared her work (in the non-measurement sense) to that of Bandura. It would be interesting to know where she started and how she got there, but perhaps that's problematic for some empiricists; it's hard to say.

So it strikes me that an objective publication can set out these kinds of things in the public domain, rather than commercial-in-confidence as it stands at present. It does little good quietly coming to conclusions about the worth of her work, or listening to people who speak of her genius, which they've experienced personally, which can get a little cultic.

Perhaps an independent monograph would provide evidence for those disdainful of Myers's work to reconsider. Or perhaps not: those sorts of issues are very complex and sometimes personal. Perhaps there are also similarities with Jung's family regarding publication of certain things.

I hope Isabel Myers and Mary McCaulley would have been happy with this outcome of their work and collaboration. ❖

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Peter Geyer photo by Brian Walsh.

