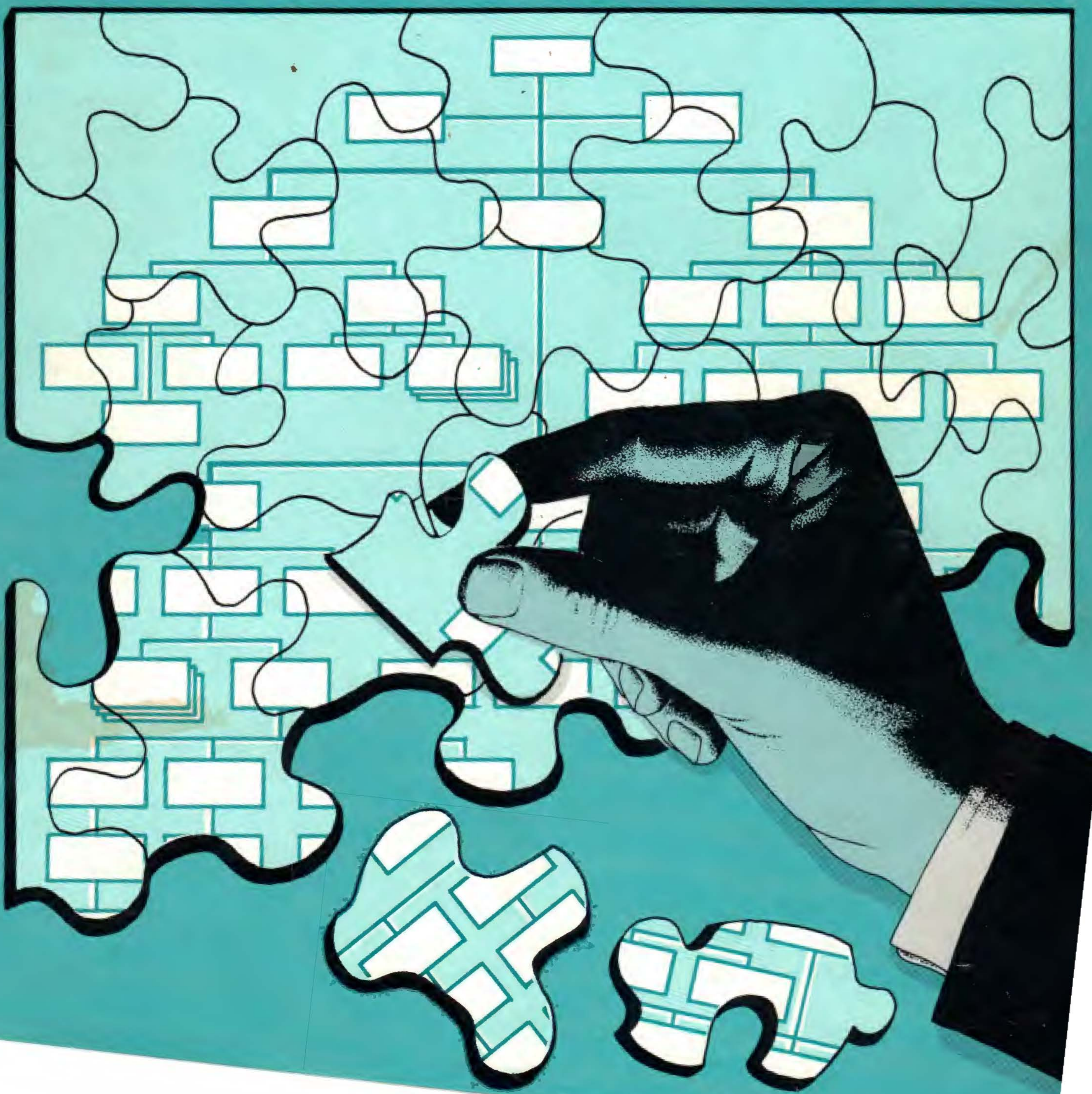
OE COMMUNIQUÉ

Issue No. 2-80

USAOECS Bulletin

Spring 1980

The Professional Organizational Effectiveness/Development Publication of the U.S. Army

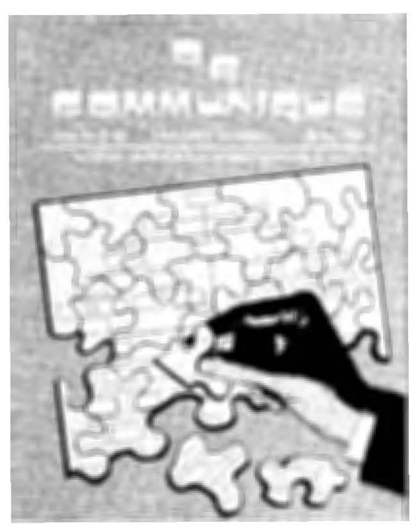


U.S. Army
Organizational Effectiveness Center and School
Fort Ord, California

Spring Issue | **The OE Communique** | No. 2 - 1980

About The Cover

A major challenge to the continuing viability of the practice of Organizational Effectiveness (OE) in the Army awaits in the arena of the large or macro system. The complexity inherent in attempting to structure, equip, and train our larger organizations to cope with the modern battlefield provides a clear incentive to further develop and expand the use of OE technology. The cover of this issue alludes to the puzzling possibilities that exist for tailoring our Army to meet the needs of the future.



The OE Communique

MISSION

The mission of the OE Communique is to provide state-of-the-art information on the application of the Organizational Effectiveness (OE) process in units and organizations throughout the Army. The Communique seeks to provide a forum for the exchange of innovations and lessons learned in the use of OE techniques and to foster the development of research and evaluation methods aimed at determining the contributions of OE to combat readiness. The Communique endeavors to develop closer ties with all OE staff officers and non-commissioned officers and to provide a supplement to their professional development. A major mission objective is to provide commanders and military and civilian leaders at all levels with practical and timely information for their use in initiating and sustaining OE operations.

CORRESPONDENCE

Direct correspondence with the OE Communique is authorized and encouraged. All inquiries, letters to the editor, manuscripts and general correspondence should be sent to: The OE Communique, US Army Organizational Effectiveness Center and School (USAOECS), Fort Ord, CA 93941. Telephone numbers for the OE Communique are: autovon 929-7058/7059 or commercial (408) 242-7058/7059.

Submission deadline for contributing material for the next issue of the OE Communique is July 18, 1980.

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Commandant's Comments

COL. William L. Golden

Largest Class Graduates

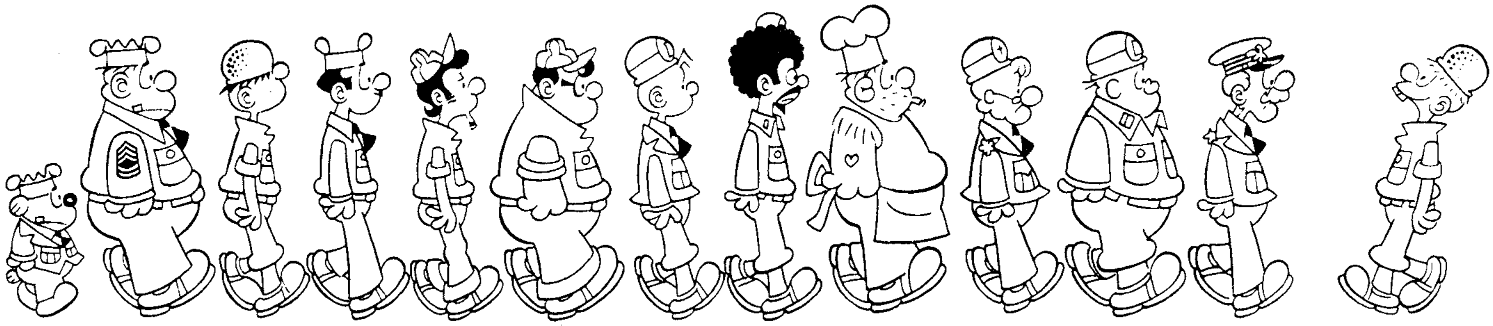
OESOC 1-80 graduated 59 students as qualified OESOs and became the record setter for class size. Included were 16 National Guardsmen who had been selected and called to active duty for OESOC attendance and subsequent OESO duty with National Guard units. Also graduating, in addition to the Active Army contingent, were two DA civilians and two members of the Veterans' Administration who will serve at two VA hospitals. The VA program is a fledgling one and OECS is proud to have been selected to provide the OE education and now assist in start up operations.

OESO Advanced Skills Workshop

OECS will conduct an eight day pilot OESO Advanced Skills Workshop in June for OESOs who have been on the job for over six months and who have at least six months retainability. In the Next Communique we will report on whether the needs assessment was correct, what was presented and how it was received. To be distributed will be a compilation of the case studies prepared by workshop applicants.

General Officer OE Users

The response from general officers whom we recently asked to detail their use of OE has been gratifying and revealing. Some of the information received was helpful to DA program managers as they recently fought a budget battle. Some of the GO letters will be published in toto, as in this issue, and others will be excerpted in our attempts to expose more of the Army to the business of OE.



Beetle Bailey and Associates Support OE

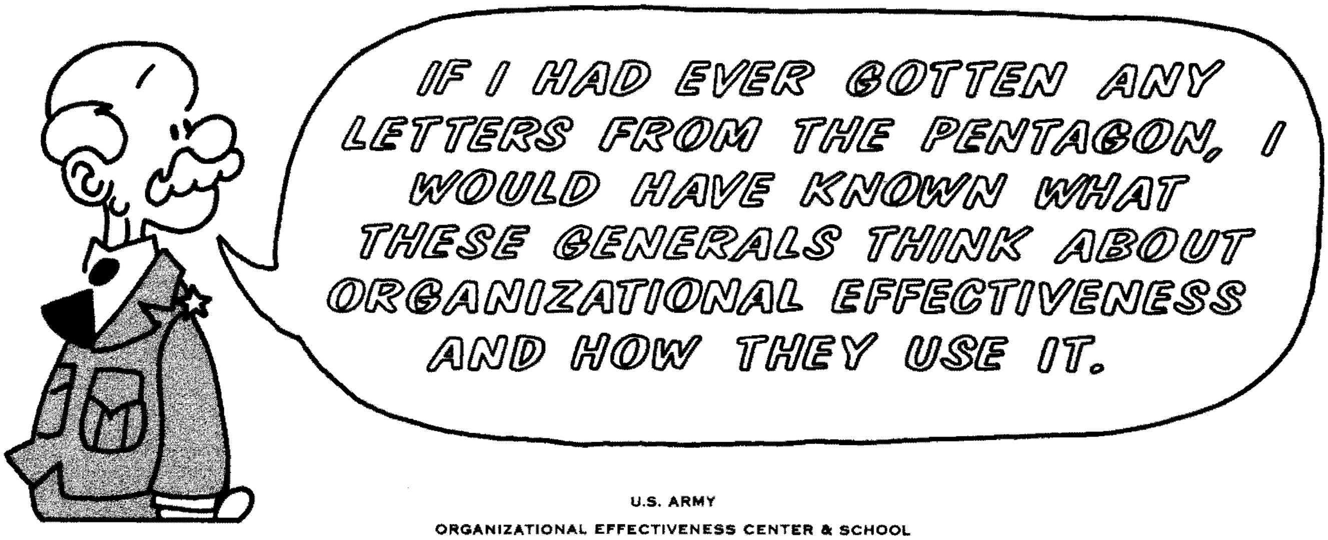
Mort Walker, an Army combat veteran and creator of Beetle Bailey, has authorized OECS to adapt his characters to help heighten Army awareness of OE. With virtually 100% of the Army identifying with Beetle's situations of mismanagement and interpersonal relations, the OE community has gained a particularly eye-catching ally. You are encouraged to reproduce and distribute the cartoons which are published in this and subsequent issues of the *Communique*.

Professional Development Assessments

The OECS repository for assessments of professional development (PD) activities attended by OE qualified people around the world continues to grow. As it grows it becomes more valuable as a tool for your use - to learn from fellow OESOs where you can best spend your OE professional development dollars. I urge you to write or call to inquire about specific course offerings or about PD in general. And when you participate, assess and send us your observations.

24-Hour Answering Capability

A reminder that you can leave a recorded message at OECS after duty hours by calling Autovon 929-2606. Our new system is getting a good workout, particularly by OESOs overseas. We promise a reply on the next duty day.



U.S. ARMY
ORGANIZATIONAL EFFECTIVENESS CENTER & SCHOOL
FORT ORD, CALIFORNIA 93941

"The Organizational Effectiveness concept is going to be important as we design the Army of the future. As our Army has fewer people in it, the ability to relate to subordinates, the ability to get the maximum out of every individual and every piece of equipment will become more and more important. This will be particularly true in years of reduced resources such as dollars and manpower."

GEN Edward C. Meyer, Chief of Staff, Army

"Executive level management teams that have gone through the process have gained clarity in their mission, clarity on who is responsible for what and most important, individual commitment to change in a way which is beneficial to the organization."

GEN John R. Guthrie, CDR, DARCOM

"We at FORSCOM are fortunate in that we have been involved in OE since its inception. To many of my commanders, use of OE technology has become second nature in their daily operations."

GEN R. M. Shoemaker, CDR, Forces Command

"I agree with the efforts to encourage commanders and managers to consider OE as one of their management tools and believe its precepts can contribute to increased effectiveness of Army Organizations."

GEN Volney F. Warner, CINC, U.S. Readiness Command

"...efforts...will be of material value to the future effectiveness of our top managers. I hope we will be able to draw upon (OESOs) in the future to assist in our management development efforts."

Harold L. Stugart, The Auditor General, USA Audit Agency

"...significant to note that over the past two years every Army Staff Agency has availed itself of the services provided by the Organizational Effectiveness Office."

LTG John R. McGiffert, Director of the Army Staff

General Halftrack and other characters from Beetle Bailey adapted and reproduced by permission.

"...used the OESO to help develop a Program of Instruction for the TOW Leader's Course. The course has proven to be outstanding in the demonstrated effectiveness of its graduates."

LTG Thomas H. Tackaberry, CDR, XVIIIth Airborne Corps

"...professional assistance rendered during the First Army Commander's Conference and the Open Systems Planning Conference...resulted in...an end product that will assist me in charting the course of this command."

LTG John F. Forrest, CDR, First U.S. Army

"...the potential benefit of using OE as part of a management repertoire justifies the cost and this will become more evident in the future. ...must continue to attempt to quantify the value...attempts, however, must never overshadow the commander's evaluation."

LTG Julius W. Becton, Jr., CDR, VII Corps

"...two items which we are working on with the help of OESOs...(1) the transition of USAREUR HQ from peace to wartime position and (2) the USAREUR/major subordinate command relationship."

MG Robert Haldane, Chief of Staff, USAREUR

"...wholeheartedly believe in and use our OESOs. ...can attest to some of the success we have had...the massive benefits, savings and improvements resulting from OE-assisted activities have been tremendous."

MG Phillip Kaplan, CDR, 1st Infantry Division

"The real impact...is indicated by the (increased) number of clients requesting services of OESOs. ...this escalation...bespeaks the effectiveness of the OE efforts."

MG Thomas P. Lynch, CDR, Armor Center & Ft. Knox

"Use of OESOs...resulted in our being able to focus on our goals for the future and tailor our organizational structure to meet those goals. The efforts concurrently brought forth commitment to implement the restructuring."

MG John K. Stoner, Jr., CDR, CERCOM

"Europe Division...works closely with USAREUR DCS-Engineer and Installation Support Agency...to plan, program, design and construct major new facilities for U.S. forces throughout Europe. ...OE session facilitated coordination... identified long standing deficiencies...and (needed) changes."

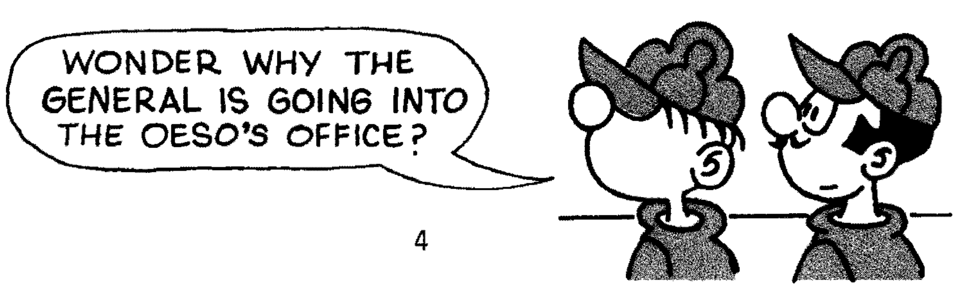
MG Drake Wilson, Div Engineer, European Division, Corps of Engineers

"The bottom line is that I am convinced that a skilled Organizational Effectiveness Staff Officer is a valuable tool of top management in dealing with the complex issues we face in an age of rapid change and data overload."

BG Kenneth A. Jolemore, Deputy CDR, USA Logistics Ctr & Ft. Lee

"I view OE not in narrow terms of specific problems, analysis and solution, but in the effective implementation of an all-encompassing management system."

BG K. C. Leuer, CDR, 193d Infantry Bde



DEPARTMENT OF THE ARMY
HEADQUARTERS XVIII AIRBORNE CORPS AND FORT BRAGG
FORT BRAGG, NORTH CAROLINA. 28307

AFZA-PA-HE

28 MAR 1980

Colonel William L. Golden
Organizational Effectiveness Center & School
Fort Ord, CA 93941

Dear Colonel Golden:

I have used Organizational Effectiveness as Commander, 82d Airborne Division, in 1975 and 1976, and as Commander, XVIII Airborne Corps, in 1979 and 1980. In both cases, I have found it to be an excellent management tool.

While in command of the 82d Airborne Division, several extended problem identification and problem solving sessions were conducted. Those sessions resulted in the identification and resolution of numerous problems, some of which we had not known existed. Although there are no records available to provide details of specific savings, the workshops always caused greater cohesiveness and effectiveness among my staff and subordinate commanders.

In November, 1979, the Corps Organizational Effectiveness personnel put together a Command and Staff Planning Workshop. The day was well spent. We were able to resolve some issues during that workshop that were deeply concerning commanders and staff. We discovered that the management of the Corps PAD and Corps taskings were the strongest dissatisfiers to the commanders on Fort Bragg. Without that workshop, we would not have uncovered or understood the problems and dissatisfaction caused by these two issues. Those issues were discovered, studied and resolved due to the OE workshop.

There is no doubt in my mind that OE is an excellent tool available to me as a commander. It has served me well in identifying and resolving problem areas and in helping me to mold my staff and commanders into a more cohesive team. Any tool that helps to do that is one well worth the time.

Sincerely,

T. H. Tackaberry

T. H. TACKABERRY
Lieutenant General, USA
Commanding

1 Incl
Description of OE Results

TO: COL William L. Golden, Commandant, US Army OE Center and School

The following are specific examples of benefits/savings/improvements resulting from OE assisted management and problem solving activities.

TACTICAL TRAINING:

1. Used OE personnel to develop a Program of Instruction for the TOW Leader's Course. The course has proven to be outstanding in the demonstrated effectiveness of its graduates.

2. Revised the Jumpmaster School's Program of Instruction. Eliminated extraneous material from the course. The OE operation also caused an improvement in safety during airborne operations.

OPERATIONS:

Identified as a major problem the fact that too many Corps/installation staff sections/agencies were tasking subordinate commands for personnel and equipment. Organized a centralized tasking agency reporting directly to the Deputy Chief of Staff. This has greatly improved the management of taskings, given my headquarters better understanding and tighter control over taskings of all types, and eliminated piecemeal and sometimes conflicting taskings on subordinate commands. We have been able to articulate problems to higher headquarters caused by taskings and thereby reduce the number of taskings given to Fort Bragg. The new centralized tasking agency has been praised as more efficient and responsive by both FORSCOM and the Corps major subordinate commands.

COMMAND MANAGEMENT:

Identified the Corps/installation Personnel Augmentation Document (PAD) as being too large and "costly" to subordinate commanders. Subsequent action on the PAD has significantly reduced the size of the Corps/installation PAD. We are now monitoring closely the PADs of subordinate commands. We have discovered that the number of personnel on the PAD and the taskings have a significant impact on unit readiness. Our monthly readiness briefings now include a report on the effect on unit readiness caused by the diversion of personnel and equipment to taskings and the PAD.

NAME OF OESO: LTC Preston T. Arnold
MAJ Rudolph M. Jones

T.H. Tackaberry
LTG Thomas H. Tackaberry

Sheet 1 of 1 sheets.

You may attribute the above to me by name.

DEPARTMENT OF THE ARMY
HEADQUARTERS US ARMY ARMOR CENTER AND FORT KNOX
FORT KNOX, KENTUCKY 40121

ATZK-PA-PS-OE

24 March 1980

Colonel William L. Golden
Commandant, USA OEC&S
Fort Ord, California 93941

Dear Colonel Golden:

This letter is in response to your inquiry of 15 February 1980 requesting specific comments about the efficacy of organizational effectiveness (OE) activities at Fort Knox. As your letter indicates, I am a strong supporter of OE. Fort Knox operations have continued across a broad spectrum of activities including the Installaion Club System, training brigades/battalions, TO&E organizations and the Fort Knox MEDDAC. All activities have been successful; some more than others.

The Transition Workshop continues to be in high demand. All battalion level changes of command that have occurred on Fort Knox in the past 18 months have utilized this workshop. Feedback from the participating commanders indicates the time was well spent. Most battalions have planned follow-up activities as a result of this particular activity. In general, the time necessary for these commanders to reach an optimum operating level with their key staff has been significantly reduced.

The Fort Knox OE office, working in conjunction with OEC&S, developed a career planning seminar to aid commanders in identifying and solving re-enlistment problems among firt-term soldiers. The one-day workshop has been implemented in three battalions. Initial results seem to indicate there is a positive correlation between the workshop and the battalion re-enlistment rate. Rates in all three test battalions rose above their previous levels; all rates increased by as much as 50 percent; and in the best unit the rate rose to 360 percent of its objective. The Fort Knox OESO's are currently studying the feasibility of implementing a continuing program within the brigades.

Work was initiated with the Fort Knox MEDDAC in August 1979. This is a long term effort directed primarily at assisting MEDDAC offer the same high quality services it has always offered but with a reduced staff. During the last OE session conducted in January 1980, programs were developed to reduce the patient waiting time in the emergency room; to have the MEDDAC Force Development Branch conduct space utilization surveys in the troop medical clinics; to reduce clinic wait time for laboratory test results; and to initiate an active doctor retention program. Positive evaluation steps have been initiated but are yet to be implemented.

The Fort Knox Dependent School System (An HEW Section 6 school under my control) has utilized the services of the OE office for in-service training on several occasions since July 1979. The Superintendent of Schools, staff and principals all agree that they are a much more cohesive body as a result of these efforts. One elementary school principal, Dennis Hockney, PhD, stated: "The L&MDC I attended was much better than the professional seminar I just attended in San Diego." The real benefit in this area is derived in a savings realized by having not to make capital outlays for professional development conferences which can be available through the Fort Knox OE office.

In an effort to improve the operational readiness rate in a One Station Unit Training Battalion with a TDA of over 50 M60A1 tanks, the installaion OE office conducted workshops at all levels within that command. The result of these workshops was a redefinition of the roles of the company executive officers, motor sergeants, senior tank commanders, and drill sergeants. The battalion commander continues to use OE and states that significantly more cooperation exists among these individuals than existed before. All are much more aware of their specific duties. The actual impact on the readiness rate is yet to be determined but is under the observation of the Fort Knox OESO's and the commander.

The OE office has developed a 2-1/2 day workshop focusing on stress management and counseling. Intended participants are unit training cadre of basic training companies. It has been applied in a limited manner in one training battalion. The battalion commander, LTC Donald F. Borden (an ex-OESO) felt the workshop had a positive effect and plans to run it in all his companies on a periodic basis. The feasibility of conducting similar workshops for the entire brigade is being studied by the brigade commander.

In late October 1979, I personally tasked the Fort Knox OE Office to conduct an assessment of the communication flow concerning community activities sponsored by the installation. Their efforts generated a voluminuous report with many significant findings. Work has just been initiated to affect the amount and means of distribution of information. In addition, follow on meetings with myself, the PAO and the OESO's are being coordinated to plan further the implementation of positive action. The relative success of our efforts will be measured by the amount of support generated for these activities.

ATZK-PA-PS-OE 24 March 1980

The real impact of organizational effectiveness at Fort Knox is indicated by the number of clients requesting the services of the local OESO's. In January 1979 a total of three organizations were serviced by the OE office. In January 1980, nine organizations were serviced either on a continuing or first time basis. The primary reason for this escalation is word of mouth advertisement about the assistance offered through the OE channels. This in itself bespeaks the effectiveness of the OE efforts.

OESO's assigned to Fort Knox are MAJ Palmer Hewlett, CPT Michael Lenhart, CPT Steven Lockhart, SFC William Easter, and SSG Annette Crebessa

THOMAS P. LYNCH
Major General, USA
Commanding

DEPARTMENT OF THE ARMY
HEADQUARTERS 1ST INFANTRY DIVISION AND FORT RILEY
FORT RILEY, KANSAS 66442

AFZN-POA-H

11 March 1980

Colonel William L. Golden
Commandant, USAOEC&S
Fort Ord, California 93941

Dear Colonel Golden:

I welcome this opportunity to comment on my experiences and use of OE resources within the 1st Infantry Division (Mech) and Fort Riley community. Not only do I wholeheartedly believe in and use our OESO's, I can also attest to some of the successes we have had in the 1st Infantry Division (Mech) at Fort Riley.

Shortly after my arrival at Fort Riley, I tasked my OESO's to coordinate a command/staff activity geared toward addressing the issues/concerns which affected the installation. The resultant seminar distinctly focused on installation topics and served as an ideal forum in which to initiate a plan and subsequent courses of action. One item which surfaced as a major concern centered around our REFORGER 79 mission. The action planning generated to address this concern, significantly aided us in identifying problem areas and establishing effective milestones to produce the desired results. Not only were we able to focus quickly on our common problems, but the seminar aided me in identifying with the installation as a whole and in becoming better acquainted with members of the organization which formed my "top team."

In subsequent OE assisted conferences we, as a team, have been able to reinforce the direction in which the Division and Installation were headed and to identify additional issues and procedures needed to remedy problem areas. Specifically, we have 1) learned how to reduce the amount of time wasted in our "top team" meetings, 2) clarified the roles/functions of the command group, 3) clarified the mission, goals and priorities of the 1st Infantry Division, 4) improved the relationships between Fort Riley's civilian and military personnel, and 5) generally improved the communications between the division/post staff and major subordinate/separate battalion/tenant unit commanders. These actions have greatly enhanced mission accomplishment and can be attributed to the assistance of our OESO's.

AFZN-POA-H 11 March 1980

Colonel William L. Golden

In addition to the standard activities normally associated with the OE process, I have tasked my OESO's to conduct various other organizational functions which I consider essential. For example: the OE office is the sole point of contact for all surveys conducted at Fort Riley. Information received from various surveys have enabled us to gain a better appreciation of our installation needs and to more effectively establish programs which positively impact upon the individual soldier.

Another project which involved my OESO's centered around clarifying the roles/responsibilities of the noncommissioned officer, within the 1st Infantry Division. Immediate benefits derived from this effort, led to a better appreciation of the roles/responsibilities of the NCO and to a significant reduction in the duplication of effort on the part of the officer and NCO corps.

Based upon a careful analysis of installation physical security requirements and crime statistics and trends, my OESO's were able to provide me with the necessary information to make a decision concerning interior guard requirements. This decision ultimately resulted in improved physical security and a net savings of thousands of dollars per year in manpower and materials.

With the advent of the new OER system, the Fort Riley Officer Corps was provided information by my OESO's on duties and responsibility charting, proper techniques of establishing performance objectives, and effective performance counselling. This timely information was provided in the form of class presentations and supporting documents by representatives of the OE office.

As you can see, the massive benefits, savings, and improvements resulting from OE assisted activities within the 1st Division have been tremendous. This letter only begins to depict the many areas in which OE has played an integral part. Additional examples of benefits/savings/improvements are provided at Inclosure 1 as you requested.

Please feel free to use any or all parts of this letter in your effort to spread the "good news" about OE.

Sincerely,

Phillip Kaplan

PHILIP R. KAPLAN
Major General, U.S. Army
Commanding

1 Incl
as

2

TO: Colonel William L. Golden, Commandant, US Army OE Center and School

The following are specific examples of benefits/savings/improvements resulting from OE assisted management and problem solving activities:

TACTICAL TRAINING:

Simulated Combat Exercises: Provided advance training to battle staff elements prior to participation in exercise. Observed battle staff during exercise and provided observations/recommendations on battle staff interactions and performance. Improved overall unit capabilities in an operational environment.

READINESS/DEVELOPMENT:

Recruiting Support: When given a new mission of supporting the Midwest Recruiting Area, OESO's identified 1) the tasks inherent in overall mission, 2) number of personnel required, 3) responsibilities/roles of personnel involved and 4) the relationship between members of support team and other staff elements of installation. As a result, the mission was assumed in a minimum of time and 1st Infantry Division performance in recruiting support sets a high standard for other installations to emulate.

OPERATIONS: (examples previously cited in letter)

OFFICE/UNIT/COMMAND MANAGEMENT:

New Arrival Study: Assessed the treatment, means of transportation, and adequacy of services provided by various installation agencies to new arrivals at Fort Riley. Information generated was provided to responsible agencies to effect changes. Resulted in improved reception program for new arrivals.

Fort Riley Survey Policy: Tasked to examine survey instruments developed both external to Fort Riley, as well as internally, for applicability and common sense prior to administration. Implicit intent of survey policy is to minimize amount of repetitive information being solicited from organizations, ultimately distracting from mission accomplishment.

Early Retirement: Assessment of general causes of early retirement of officers and NCO's at Fort Riley. Results were provided to unit commanders to effect positive steps toward retaining senior service members beyond 20 years service.

OTHERS: Civilian Personnel Office Training: Recognized immediate monetary savings through use of internal OE consultants to instruct military and civilian supervisors on managerial related subjects (i.e., time management, leadership, decision making, goal setting, etc.) Instruction significantly and effectively increased the amount of managerial skills of all participants.

NAME OF OESO: MAJ Small, CPT Anderson, SFC Kirkland

Incl 1

Editor's Comments

MAJ Paul J. Rock

Consulting: The art of seeking another's approval for a course of action already decided.

Ambrose Bierce
"The Devil's Dictionary"

A NEW LOOK COMING FOR THE OE COMMUNIQUE

The OE Communique has recently been elevated in status to that of an "official Army periodical." What this means is that the Communique will be able to greatly extend the distribution of its practical, "how to" type of information. We will be able to reach more of the Army's leaders, managers and decision-makers, both military and civilian, while continuing to provide a form of professional development for the OE practioner.

With regard to the "new look", we are gearing up to make some visual changes, beginning with the next issue, to enhance its professional appearance. It is our aim to have the appearance, as well as the content of the Communique , attest to the high level of professionalism and quality that resides in the OE community. We are, of course, always interested in comments from the field about how to improve the magazine; we are, afterall, in the "change" business.

The Communique is possibly the only publication of its kind in the Army that is devoted exclusively to the application of "tried and true" as well as innovative leadership and management techniques and practices. The new status accorded the Communique provides the opportunity to carry the messages of the contributors to the publication to a wide variety of Army leaders, including those at the very top.

In light of this, I think that it is most appropriate for those folks who believe in and support the Communique to seek out and solicit input from those leaders and managers who have adapted the OE process to their organizations. I see the Communique evolving into a forum wherein commanders and managers "talk" to other commanders and managers, and where OESO/OENCOs "talk" to the Army's leadership as well as to each other.

The 1980's hold exciting opportunities and challenges for the practice of OE. With the support of the OE community, the OE Communique can play an integral part in this next decade assisting OE in its efforts to provide for "a more effective Army."

PHOTOS AND BIO's

For those who contribute material to the Communique and who haven't got the word, let me repeat: We are very interested in including a picture and 50-75 word biographical sketch of the author with the articles printed in the Communique'. A 5x7 black & white glossy is perferred, but we'll try to work with what you submit. Unless you request their return, the photos wll remain on file with Communique.

PROFESSIONAL DEVELOPMENT

Your attention is invited to a new section beginning in this issue of the _Communique_ entitled "Professional Development." We are looking for folks who wish to share their experiences with professional development activities. We _are not_ looking to endorse or condemn the particular corporation, firm of individual who conducted the activity (we couldn't if we wanted to). Rather, we are looking for reports on the structure, content and outcomes of the experience and your comments on the actual or anticipated payoffs that the learnings will have for your OE work. If you have such information and wish it published in the _Communique_ , please indicate that your article is for inclusion in "Professional Development."

ON JARGON

"Your school turns out guys who are too much theoreticians and who use too much jargon. I've had to learn some of their language, even with my background (Harvard Business School) and an interest in doing so, to be able to communicate with them well. Some of my 0-6's out there don't have as much interest in trying to understand as I do.

MG JAMES S. WELCH, CDR,
DESCOM
(as heard by an OECS
faculty member)

LETTERS TO THE EDITOR

Dear Editor:

In reference to Issue No. 1-80 Winter 1980 OE Communique's Commandant's Comments, "The Voluntariness of OE" we would like to comment.

Active advertisement of OE assets and what OE has to offer has proven to be a must. We constantly seek out potential users of OE and exploit success. On occasions, however our calendar may begin to look fairly open. As an example of the type of action that can be taken on such occasions, we drafted a letter for our commander (1st Corps Support Command) to send out to all subordinate commanders and staff agencies advertising the availability of OE assets. We received two productive phone calls the first day it went out.

Excuse the jargon, but the bottom line is: IT PAYS TO ADVERTISE.

Sincerely yours,

ROY P. CRAWFORD
CPT, GS
OESO

Dear Editor:

I was recently able to borrow copies of the Organizational Effectiveness Communique through the N.Z. Ministry of Defence library. Our officers found this such a useful and informative periodical and have asked if it is possible for this library to be placed on the circulation list for it.

OFFICE OF THE
STATE SERVICES COMMISSION
PRIVATE BAG
Wellington, New Zealand

Dear Editor:

On page 27 of the Winter OE Communique there was some information concerning civilian academic credit of the OESO Course I would like to add to that. I am a student in the USC Master of Science in Systems Management (MSSM) program. I petitioned USC for transfer credit for the OESO Course and was awarded nine transfer credits: two elective courses (6 credits) and one required course (3 credits, SSM 523). I spoke with the Director of Student Affairs, Ms. Harriet Porch, who said that other OESO Course graduates would also be entitled to the same transfer credit. The program requires a total of 36 credits.

I think this MSSM program is excellent. It has been helpful to me in shifting my thinking and approach to OE toward the "systems" view so I may keep up with the Army's shifting focus in OE.

JOHN L. KENDRICK
CPT, OESO
HQ, V Corps

Dear Editor:

I just finished reading the October issue of the Communique. As soon as I read your article I said to myself "I've got to tell about our consulting cell/mini consulting firm."

There are three of us, myself, MAJ Bob Brace and SFC Bill Powell. First I will talk about our scope of clients, then about how we got this way, what the firm looks like today and finally what we get out of it.

The organization is a little complex and at first a little confusing. I am assigned to the 18th Engineer Brigade. The brigade is composed of the Headquarters and six engineer battalions. The headquarters and three of the battalions are located in the same community. The other battalions are located from 40 to 150 miles away. Bob is assigned to the community (Karlsruhe). The community being the staff and all the agencies and support facilities (DPCA, DIO, SPO, Rec Services, Dispensary, PX, Commissary, etc.). Bill is assigned to the 18th but tends to split his time between the brigade and community. If you want to look at it in terms of number of potential clients (staffs and company size units), it totals up to about 120-140.

We came together as a cell initially due to a shortage of office space. I arrived first and shared an office with another staff, as my predecessor had. The man I shared the office with just happened to be sponsoring Bob who arrived about six weeks after I did. He and I put our heads together to look for offices (the office I was in was a little too public for my needs and he needed more room) where we could put three OESOs as I knew I would be getting an NCO in the fall. It all started as a matter of convenience. It was a way to maximize use of office space and my library.

Today our physical set up has us in one large office with a small conference area. We are next to a fairly large classroom with complete audio-visual facilities. More important is the way we operate. Our "boss" is the brigade/community commander (fortunately the same man wears two hats). Day-to-day we work through his deputies, basically keeping them informed on what we are doing. Then once a month we have a formal meeting with the commander. At this meeting we give him feedback on how he is doing and how the two commands are doing (he also gives us feedback) and we give him a quick rundown on what we are up to. This meeting is scheduled in advance and by no means precludes the several informal meetings we might have during the month. He has been an active user of OE so one of us is usually meeting with him fairly often. Both deputies have used or are using OE although with somewhat less success.

Early on we saw several advantages to the colocation of the OESOs. We also found ourselves assisting each other on an informal basis. This bothered us a bit as we were assigned to two separate units and we weren't sure the boss was first of all aware of what we were up to and second approved of it. We quickly designed a model of how we would work and set up our series of monthly meetings and formalized the way we were working. He thought it was great. Basically, what we told him was that I would work on the brigade side, Bob would work on the community side and Bill, when he arrived, would work mostly on the brigade side and as the need arose, he would cross over to the other side and help out.

What do we get out of all this? Well we get a lot. The support is fantastic. When all of us start planning together, the synergy is incredible. A new thing we are going to try is having one of us do some follow up work with a former client of the other to give that person an idea of how well he did. All in all, I don't think any of us would change the way we are set up. We have just discussed all this and have discovered something else. Because we tend to focus on the brigade or community, as the case may be, we can maintain a clear perspective on the organization and act as a consultant to the other person.

As I look back on all that I have written I guess my real motivation has been to give you an idea of how another OE cell is operating. I also have to admit I am a little proud of the way we work.

Sincerely yours,

ROGER PIETZ
18TH Engineer Bn
APO NY 09164

Dear Editor:

I want to thank you for publishing the Article I submitted, "Case Study; MACRO-Systems Action Planning," in the Winter 1980 edition of the OE COMMUNIQUE. However, 95% of the credit for this article must be given to the former INSCOM OESO, Major Bruce Coleman who is now serving in Europe. Bruce drafted the article describing the workshop he designed. When Bruce left for Europe, he suggested I look it over and if suitable, send it to OEC&S for your files. I did perform some editing and information retrieval; but, the basic article belongs to Bruce.

A follow-up conference to the one mentioned in Bruce's article was conducted in November 1979. I had the opportunity to design and conduct a 3 1/2 day Problem Solving Workshop held during this conference. An article describing this workshop will be sent to you in the near future describing the general situation, client comments and resulting actions.

I am extremely impressed with the new COMMUNIQUE. Its mere appearance sparks of professionalism. The "Letters to the Editor" lets the correspondent know his/her comments have been received and considered. The "OE Forum" and "Theory and Practice" continue to be educationally rewarding. Also, thank Coy Brown for "OESO/OENCO Sample Calling Card." Most helpful!

Keep up the professional work.

Trust the Process -

JAY TATE
INSCOM Headquarters
Arlington Hall Station

Reply:

Dear Jay: the editorial staff of the OE Communique' appreciates your kind remarks. It is gratifying to hear that our efforts contribute in some way to the OE practioner in the field. The bulk of the credit, however, for being "educationally rewarding" must go to folks like you and our other loyal contributors who share their knowledge and experience with our readers. We look forward to hearing from you in the future.

Editor

Dear Editor:

CPT David Teichman, OESO for the Field Artillery Training Center, Fort Sill, OK, conducted an OE workshop at Montego Bay Motel in Lawton, OK. At the same time, CPT Bob Lyles, Post OESO for Fort Sill, was conducting a Transition Workshop at the same location.

In an attempt to satisfy our ego needs, the Montego Bay management displayed this message for all passers-by to see:

"All I can say is "OESOs" have been called Turkeys on many occasions, but Ducks?"

Thought you might enjoy this bit of humor.

CPT DAVID A. TEICHMAN
OESO
Fort Sill, OK

EDITOR'S NOTE:

CPTs Teichman and Lyles no longer practice OE at Fort Sill. They were last seen flying south.

Dear Editor:

In april 1979 the OE Staff Office was tasked by the CG of USAREC, MG Mundie, to design a one-week course on (Sales Management and Motivation) to be taught to new commanders of District Recruiting Commands (DRC) and Recruiting Areas (AC). The DRC commander is a LTC, the AC is a CPT. The course known as Recruiting Commanders Course was presently being taught by a civilian sales organization, but the CG and the OE staff agreed the course was only having a short-term effect on the personnel attending plus the fact it was being taught from a civilian sales point of view ad not military.

Starting in June the OE staff, Major James Orahood (OESO), SFC Ruth Patch (OENCO & 8 years recruiting experience), SFC Tom Adams (OENCO & 3½ years recruiting experience), SFC Carl Nelson (OENCO & 3 years DRC PSNCO) and myself (OENCO & 9 years recruiting experience) came up with the initial outline of the course. Things considered were leadership, management, communications, sales cycle, & leadership & management situations related to recruiting duty.

In August we came up with the final design which turned out to be a four and one half day course we named appropriately, Sales Management & Motivation Course. We scheduled several practice sessions in which one person would present his or her material and the others would evaluate and make suggestions to add or take away material. As I made note in the preceding paragraph, we had much recruiting experience in our office, as well as OE skills to draw from. Every block of instruction was laced with recruiting and sales situations to help the new recruiting commanders to more effectively adapt to this type of leadership role. This was the concept that the CG wanted to accomplish.

We presented the course for the first time in September 1979. Our course received excellent evaluations from the commanders in attendance. This was to be a test phase to see what we would have to change for the next course. As it turned out, only some minor changes were necessary. We have now given four courses and have gotten excellent reviews from participants. From the beginning we were to teach four courses and then there would be an evaluation period from our Training Directorate. Due to the excellent reviews, we are now to continue to teach the course permanently.

The original cost of the course as it was being taught by the civilian organization was $6,000.00 per course. By using military resources we were able to reduce that cost to approximately $1,000,00 per course. We the people in the OE staff have found the experience of designing and presenting the (Sales Management & Motivation Course) to be personally and professionally rewarding and certainly organizationally beneficial.

The course has several benefits to this MACOM. Besides demonstrating to new commanders what the OE team can provide to them in the way of support, we are having a preventive effect. By starting new commanders off with this preparatory course, their transitions into command are generally much smoother & more effectively done than those done previously.

MAJOR JIM ORAHOOD, OESO
SFC HARRY SHAFFER, OENCO

U.S. Army Recruiting Command

Updates

DA Updates

MAJOR C.L. FLANDER
HQDA

Time for another update from DA. This is what's been happening since the Winter-80 issue of the OE Communique.

• MACOM SUPPORT PLANS: The MACOM OE 3-10 Year Support Plans, FY 80-86, have been received and approved by this office for final implementation. They are good managerial tools for managing the transition of OE into a macro-system approach over the next seven years. Additionally, the plans provide for the transfer of basic OE skills to unit personnel managers and there is a requirement to provide case study documentation which is to be used as the basis for the annual command summary.

• CHANGE 1 TO AR 600-76: Change 1 to the OE AR 600-76 dated 1 Feb 80 has been distributed to the field. The regulation places great emphasis on the continued professional development for OESOs attending OE related workshops and conferences. Change 1 also requires OESOs to submit course critiques of his/her experience from any professional development activity. Reports are required to OECS, ATTN: ATXW-RMA-TL within ten days of attendance to the training activity.

• OE PERSONNEL MANAGEMENT - MILPERCEN: Major Boone replaced Major Jim Gesner and started work in February. His job is to assist in the selection, screening, and assignment process of all officers in the Organizational Effectiveness program. On a limited basis, MILPERCEN can provide support to local commands in providing TDY and return basis. Commanders considering this alternative to filling vacant OE positions within their command can obtain further information from MAJ Emmons, Autovon 221-0250/0251.

• OENCOs: The OENCOs have earned a great deal of credibility in the system, most reports state they are working very well. Initial data received from surveys indicates there is a role and a need for OENCOs. However, the ultimate criteria for continuation of the program as is would be whether or not the Army could afford to resource quality E7/E8/E9s. DA's position would be that we are not attempting to develop a career field but would expose as many NCOs as possible to the technology and application so that we could produce quality first sergeants and sergeants major. This position is no different than for OESOs. Final input to the evaluation has been delayed because of the Army's moratorium on surveys. The final wave is underway. The decision date of June 1980 will not be extended; we plan to compress our staffing time to meet that date.

- CIVILIAN OESO PAMPHLET: The DA Pamphlet for civilian OESOs is scheduled for publication this summer. The pamphlet contains procedures for use by OE key managers, OE chiefs, and OESOs. Subjects wthin the pamphlet deal with the acquisition of civilian OESOs, quality control, training, and professional development.

- OE IMPACT ANALYSIS: The establishment of organizational effectiveness as a full Army program provides opportunity for continued viability and growth. It also means that OE will continue to be examined from the perspective of affordability, specifically to show what contribution it is making to the Army. As an integral part of the Army's overall evaluation plan for OE, Arthur Young and Company has been contracted to develop a comprehensive research plan to analyze the impact of the OE program. The results of this analysis will be used to make the necessary program and policy changes to maximize long-term benefits to the Army. The methodology for this analysis effort uses the interview process in conjunction with examination of past OE operations. Pilot tests of this procedure were completed last month; the results substantiated this methodology as the most productive, most effective, and least disruptive. Actual research began in April. The project leader is Mr. U. S. James. Major command and installation OE managers will be involved in the selection and scheduling process in order to provide proper case representation as well as to preclude any unnecessary burden on daily operations.

OECS Updates

EVALUATION UPDATE

The beginning of 1980 finds the Directorate of Evaluation (DOE) without the services of LTC Joe Watt (retired 31 Dec 79) and Mr. Dave Savard (retired 25 Jan 80). With their departure goes a wealth of experience, expertise and professionalism as well as a great deal of enthusiasm for OE that will not soon be replaced.

The remaining DOE staff is characterized by compact size but plenty of capability in collection, analysis and data processing. DOE effort remains focused on two broad functions:

INTERNAL EVALUATION to provide feedback to instructors and course developers concerning the instructional delivery system and the course development process. The tools of the internal evaluation are student critiques, measures of student proficiency including self-, advisor- and peer-ratings and examinations.

EXTERNAL EVALUATION to provide information about the current state-of-the-art and OECS graduate performance. External evaluation provides the means of linking field results and documented program activity with training goals and doctrine. External evaluation is conducted through 6-8 month post-graduate surveys and field visits to selected installations and activities.

The credibility and usefulness of purpose of evaluation is a key ingredient of the TRADOC Instructional Systems Development (ISD) model as implemented at OECS. OECS staff and faculty are sensitive to OE field results and have never been more eager to learn of OESO problems, successes and needs. The OE Operations Reporting Handbook was distributed early this year and was generally well received. In fact, DOE has already received several very well documented case studies from OESOs who have followed the handbook format. Continued OESO support of evaluation will be even more critical in the months to come in 1980 due to increasing enforcement of constraints on surveys throughout the Army. The moratorium on surveys was lifted as of 1 March 1980. At the same time, DA has imposed great control over the entire survey process including a DA Survey Review panel, a survey control numbering system and a DA Survey Master Plan, all for the purpose of minimizing the number and variety of data collection projects in the field at any one time. This means that data collection projects that cut across command lines (i.e., OECS EXTERNAL EVALUATION) must be planned and coordinated well in advance of the actual collection effort. The bottom line for evaluation is probably decreasing reliance on survey and increasing reliance on OE operations reporting.

CONCEPTS DEVELOPMENT DIRECTORATE

ADVANCED SKILL COURSE

Concepts Development Directorate has completed plans for the first OESO/NCO Advanced Skills Course. The course will provide coverage of up-to-date theory and up-to-date successful practice relevant to the field. Core subjects will include:

a. OE marketing strategies.

b. Performance management.

c. Advanced facilitation and problem solving.

d. Evaluation considerations and survey processing.

e. Combat-related OE.

f. Developing and using organic surveys and surveys-based OE.

g. Open systems and strategic planning.

h. Organizational design.

i. Macro-systems.

j. Strategies for consulting with senior military executives.

In addition to the primary subject areas, the course will use various learning modalities including the case conference method -- dealing with OESOs' back-home issues and innovations. This course is designed for the experienced professional. Therefore, we are being very selective in recruitment and selection, only involving those who will benefit by interacting with experienced-level colleagues and an outstanding military and civilian inter-disciplinary faculty. Allocations have been provided each MACOM and arrangements for attendance should be coordinated through your MACOM OE office. It is our opinion, having attended many of the current conference offerings OE/OD, that this workshop will be the finest professional development course offered this year in the United States. It will be a pragmatic, "how to" approach to OE consulting.

SOCIO-TECHNICAL SYSTEMS

Concepts Development has recently completed a workshop/seminar focused on the area of Socio-Technical (ST) systems. The purpose of the conference was to develop a common core of knowledge about ST theory and practice, and then apply those learnings toward the identification of potential areas when the technology may be applied to improve force readiness and/or productivity. The overall objective was to develop specific plans to initiate, conduct, and evaluate the impact of ST operations in combat, combat support and combat service support activities. Many OESOs brought their clients with them. The learning environment, joint problem solving, socio-technical systems, and methodologies all contributed to launching a number of ST operations in the Army (see executive summary of ST conference in this issue). A detailed article on the conference may be found in this issue of the Communiqué. Socio-Technical remains the interest of CPT (P) Hawks and MSG Bartlett.

EOD

During the last three months the members of the External Operations Division (EOD) have been heavily involved in external consulting. Some of the operations conducted have been:

a. Open system planning with CG, 1st Army.

b. Action planning, Commander, USA Environmental Hygiene Agency.

c. Long-range planning for Commander, Readiness Group, Los Angeles.

d. Internal management DCMDT, CGSC.

f. Problem solving, Commander, MEPCOM.

g. Collaborative problem solving New England River basin.

Possible operations in the future will involve an Engineer District, a socio-tech operation and, perhaps, consulting at the Department of Army or Department of Defense level.

From these experiences, EOD has begun to devlop some new concepts dealing with the consulting process at macro systems levels. These concepts will be described in communique articles and will be integrated into both the basic and advanced OE courses.

RESEARCH DIVISION

The Research Division is temporaily reduced in size while CPT Price attends the OESOC. Among current activities are the division's involvement with varying aspects of research management, further identification and classification of OE/OD information sources, and the formulation of a complete work plan which outlines and details the inputs, throughputs and outputs involved in an optimally managed research division.

TRAINING DIRECTORATE

OESO Class 1-80 is completing the 10 weeks of instruction at Fort Ord and will soon go on the 4-week practicum (FTX). The five FTX sites for this class are: Redstone Arsenal, AL, (Mr. Goodfellow), Ft. Monmouth, NJ (MAJ Hatler), Ft. Riley, KS (MAJ Lenz), Ft. Sam Houston, TX (Dr. Milano), Ft. Lee, VA (MAJ Langford). In Class 1-80 we have students from the active Army, the National Guard and the Veterans' Administration. Also in attendance is COL Voorhees, a consultant to the Chief of Staff of the Army.

Class 2-80 will begin on 7 April 1980; 3-80 in June; and 4-80 in August. We are planning on four (4) classes this year.

In addition to the 16-week course, we will participate in the Pre-Command Courses at Ft. Leavenworth, KS, and conduct the Key Managers' Courses. The first Key Managers' Course will be conducted at the TWA Breech Academy, Overland Park, Kansas. MAJ Kniker will manage the program which will include information on OESO training, the OESO and the Commander,OE program management, optional workshops and DA OE policy briefings. This class will number about 36, with general officers and colonels in attendance. The Key Managers' Course is proving to be very worthwhile.

Other efforts include: We will continue to teach Leadership and Development courses, conduct special programs for professionals interested in OE technology and involvement with other services concerning OE technology. Planning is also underway for an advanced skills conference at Fort Ord this summer.

Curriculum Up-date

A major effort in Training is to improve the 16-week course from the standpoint of obtaining new technology to keep our students up-to-date, bring in outstanding professionals in the field, and keep our faculty abreast and current in new O.D. technology. For example, for Class 1-80, we had three guest instructors. Dr. Sherman Grinnell presented an outstanding program on systems simulation which greatly helped in developing useful systems models. Dr. William Pasmore presented a program on Soci-technical systems which is gaining interest in the military, and Jay Nisberg, consultant for the R.C.A. Corporation presented a truly outstanding program on Organizational Development. Jay provided us with many ideas for the future. In addition to outside consultants, I continue to have faculty members attend professional development programs to assist in maintaining a high level of excellence in the classroom. Dr. Eppler has attended an O.D. program at Harvard University. Dr. Guido completed a program at M.I.T. in Career Planning, and is completing training in Assessment Center technology. Mr. Goodfellow and CPT Marsha Hawks will attend OD '80 in San Diego. MAJ Langford has attended a program at Columbia University, MAJ Kniker attended a program in strategic planning at the Army War College. MAJ (CH) Hatler will attend a conference at Fort Monmouth on ethics, and he represents us at all Chaplain programs involved in O.D. SFC Belasto has produced a film at Ft. Benning, GA, to be used in our course on Process Performance of Battle Staffs. MAJ Lenz attended a program at the American Management Association in New York and will present a paper on O.E. at the American Psychological Association Conference in Canada. Lastly, LTC Fisher is completing training in Neurolinguistic Programming, which holds great promise in improving levels of communications. As you can see, effort is directed towards presenting the best course possible.

FTX Standards

We view the practicum as a key step in the development of the Army organizational consultant. To insure the standards are met, all students must complete a 4-step program under faculty supervision and record that operation in a case study format. To date, we continue to follow and emphasize the philosophy of COL Golden and all Directors at the center to consult at the highest level. We are doing just that and with major results. For example, students are now consulting at the Brigade, Division, and Directorate level. We are conducting workshops at the general officer level and moving into National Guard and reserve OE programs. In order to keep track of this effort and provide case studies for future classes, the Training Development Directorates has published an outstanding text on recording and evaluating OE operations in a particular type of organization. Give Lynn Herrick a call and she will provide an abstract of the operation or refer you to the student OESO or faculty member who conducted the operation. We view this as a major step forward in training OESOs and assisting the OESO in the field and the total OE effort in the Army.

Faculty Up-Date

The faculty remains the same with the following exceptions. LTC Bahm will take command of an Artillery Battalion in April at Fort Ord. MAJ Kniker will depart for CGSC at Fort Leavenworth this June. All of our outstanding NCOs will stay on this year. MAJ James is planning to retire in August and will move to Washington, state. We welcome CPT Hopkins to the faculty. He was an OESO in Europe.

TD UPDATES

ASI 5Z CHANGE

Change 6 to AR 611-101 dated 15 October 1978 changed the title of ASI Code 5Z from Human Resources Manager to Organizational Effectiveness Staff Officer. Local experience indicates that this change has not been made to some individual's DA Form 2. We recommend that each OESO verify that this change has been made to their personnel file (Form 201).

TV TAPE

A television tape on the "Assessment" step of the OE process has just been completed. This eleven minute tape provides a look at typical OE procedures that occur during assessment. It will be distributed world-wide upon completion of validation and reproduction procedures. It is anticipated that it will be in your servicing film libraries by the end of June 1980.

The word is that the "What is OE" tape is now on hand at your film library. We think that we've covered all bases in distributing it. However, if we've missed somebody, drop us a line along with a thirty (30) minute blank tape and we will provide you with a copy. Please request copies of the tape only if your local Training Aids Services Office (TASO) does not have a copy to reproduce for you.

We would also like some feedback on how you use these tapes and their relevant value to you.

OE TRAINING IN THE SERVICE SCHOOLS

CPT Sims is presently involved in developing an overall Training Strategy for incorporating OE related training into the OBCs, PCCs, CS_3, functional TDY courses and CGSC on a systematic, non-reportable, progressive basis in line with the recent TRADOC recommendations. This training involves the tasks, skills, and knowledges for which OECS has the proponency for developing training. This training strategy would be used as a guide for the various service schools and develops a "track" method of transfering OE related skills. Thus, a major would not receive the same level and scope of training in communications (as an example) as a new lieutenant at OBC. Comments will be solicited from various service schools on its applicability.

PERFORMANCE MANAGEMENT

CPT Sims is preparing, in conjunction with LTC Frank Burns, DA, the three-day Performance Management Workshop used by the DARCOM and DA OESOs. It will be a special text and should be available sometime this summer.

OESO JOB AND TASK ANALYSIS

On 21 April 1980 TD hosted the ARI In Progress Review (IPR) of the OESO Job and Task Analysis: Job Competency Model Contract conducted by McBer and Company.

Attendees included the Commandant and Directors of OECS, Dr. Otto Kahn and Dr. Glenda Nugami, ARI. Dr. George Klemp of McBer made the presentation which included project background, current status, problems and what we can expect in the future in the way of deliverables and how we can use the results.

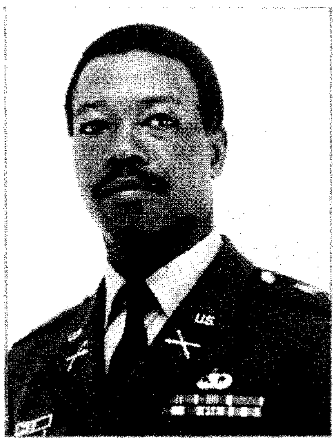
The Job/Task and Job/Element analyses have commenced after a better than average response to the questionnaires by field OESOs. Only the interview data remains to be collected. The delay in interviews caused by the FORSCOM survey moratorium has been overcome and Dr. Nugami will be contacting OESOs and setting up interviews. Hopefully, the delays and date changes have not caused you too much confusion! Project completion will be delayed four to five months.

After Dr. Klemp's presentation the directors and other directorate representatives action planned ways to use the data and strategies for implementation.

As soon as we get some hard data from the analyses we will publish it.

OE Forum

USAOECS Socio-Technical Conference
19-22 February 1980
Final Report



MAJ James H. Jackson
USAOECS
Fort Ord, CA

Major Jim Jackson graduated from South Carolina State College in 1966 and received a commission in field artillery. His assignments include duty with the 82d Airborne Division, 1st Armored Division, South Carolina State College, I Corps (ROK/US) Group, and the 24th Infantry Division. He has held every field artillery position from forward observer to battalion executive officer. Major Jackson is currently Chief of Concepts and Studies Division, Concepts Development Directorate, Organizational Effectiveness Center and School.

The USAOECS held a conference on socio-technical systems during the period 19-22 February 1980 at the Ramada Inn in Monterey, California. The purpose of the conference was to develop a common core of knowledge about socio-technical theory and practice, and then apply these learnings to identify potential areas where the technology may be applied to improve force readiness and/or productivity. The overall objective was to develop specific plans to initiate, conduct, and evaluate the impact of socio-technical operations in combat, combat support, and combat service support activities.

Conference attendees included a cross section of the targeted activities. Specific activities/units represented were:

a. DESCOM
b. MEPCOM
c. USAREC
d. Madigan Army Hospital
e. Ft. Hood (XM-1 tank)
f. Ft. Sill (Adjutant General)
g. Ft. Carson
h. USAOECS

At the end of the conference all of these activities/units had developed a strategy for using socio-technical theory and concepts to contribute to force readiness and/or productivity. The design of the conference, coupled with excellent instruction on socio-technical theory and concepts, contributed immeasurably to accomplishment of this most important objective.

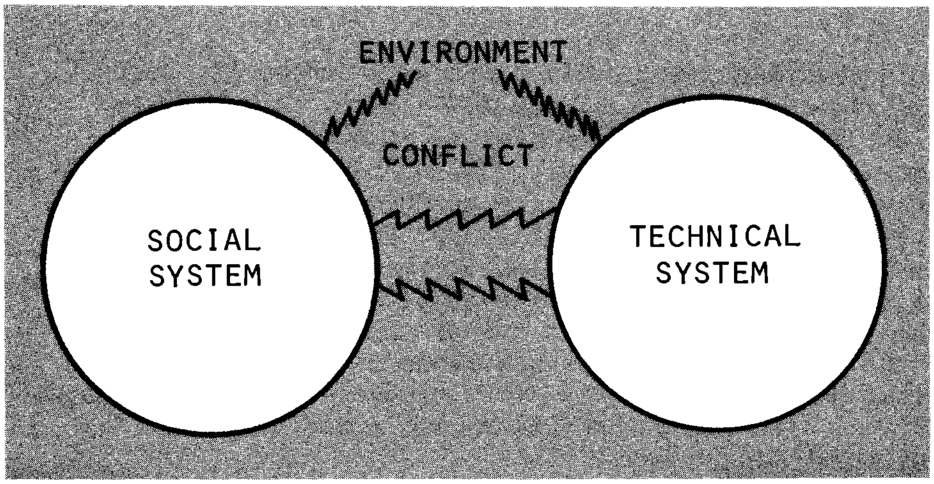
The quality instruction mentioned earlier was provided by Dr. James C. Taylor, UCLA, with assistance from Dr. William A. Pasmore, Case Western Reserve University, Dr. Taylor and Dr. Pasmore are both recognized as leading authorities on socio-technical theory, having published extensively on that subject and having successfully applied the theory in a variety of public and private organizations. Additionally, Dr. Pasmore is currently conducting a socio-technical research project with the World-Wide Military Command and Control System in USAREUR under the auspices of the Army Research Institute. One of the most important things that these two authorities did throughout the conference was the avoidance of jargon as much as possible. Additionally, their availability after scheduled conference hours to discuss socio-technical theory and concepts proved a definite plus for the overall success of the conference.

Of great significance was the attendance of two general officers. Major General Welch, Commander DESCOM, and Brigadier General Jolemore, Deputy Commander, U.S. Army Logistice Center, Ft. Lee, Virginia. Both of these officers contriubred much to the conference and left with strategies for implementing socio-technical concepts/methodology in their respective operations. They also expressed pleasure with the overall conference as evidenced by their critique forms.

The conference agenda called for two (2) days of theory/concepts and approximately one and one-half days of action planning by the cross-section of activities/units represented.

Socio-technical theory and concepts presented by Dr. Taylor and Dr. Pasmore accomplished the objective of getting all participants on a common ground as to what socio-technical systems was all about and on possible use of the technology. Specifically, socio-technical systems employs the concept of looking at organizations as composed of two systems -- one, social (people, their values, attitudes, etc.) and two, technical (the equipment, methods, manuals, etc.). These systems work together under a concept of joint optimization in interaction with the environment to produce a product and/or desired state of readiness. A poorly designed socio-technical system might look like this: *(See illustration on next page)*

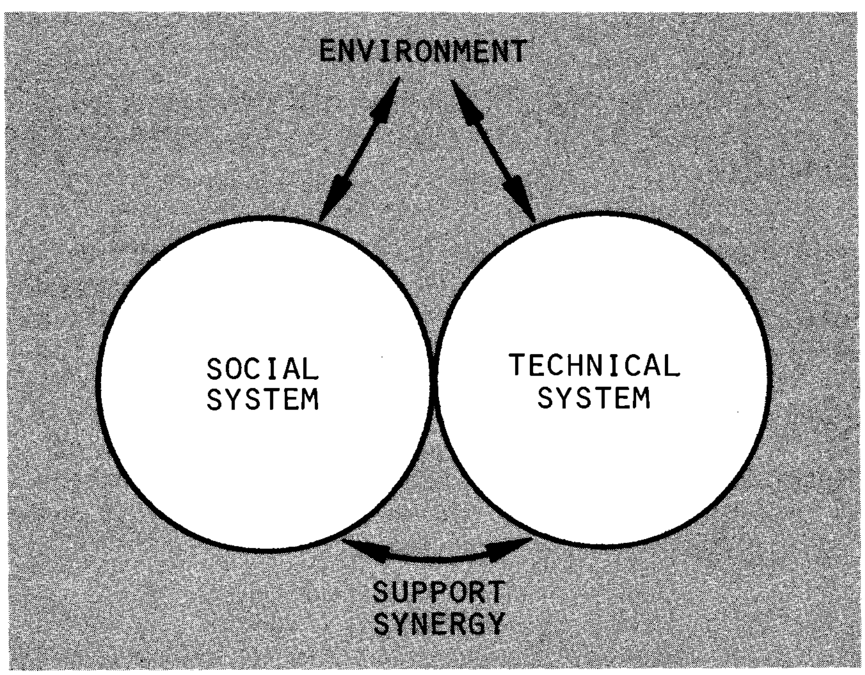
POORLY DESIGNED S-T SYSTEM



OUTCOMES

- ALIENATION
- LOW PRODUCTIVITY
- TURMOIL

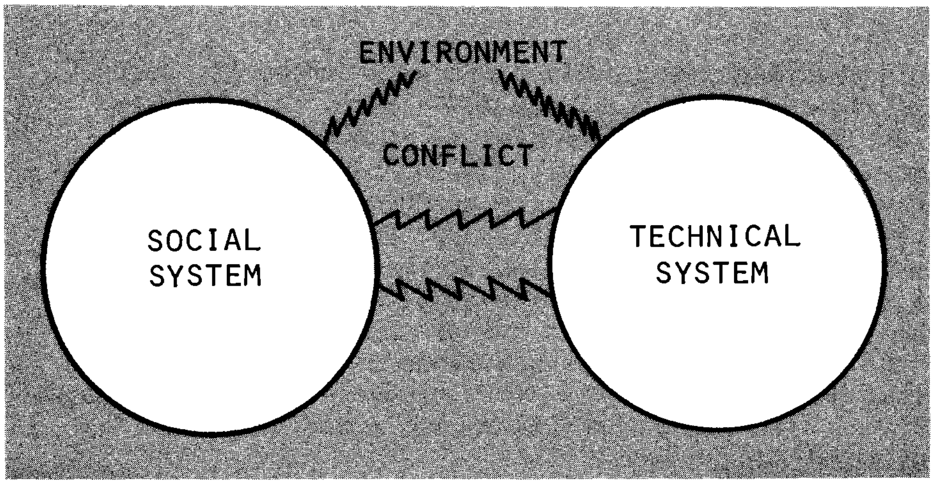
A well-designed socio-technical system might look like this:



OUTCOMES

- SATISFACTION
- PRODUCTIVITY
- ADAPTIBILITY

POORLY DESIGNED S-T SYSTEM



OUTCOMES

- ALIENATION
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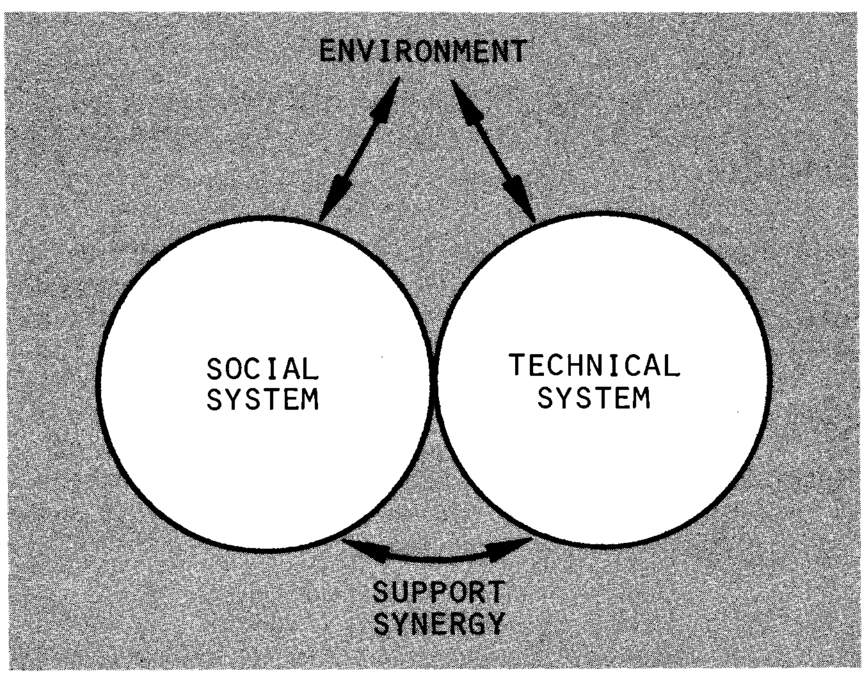
A well-designed socio-technical system might look like this:

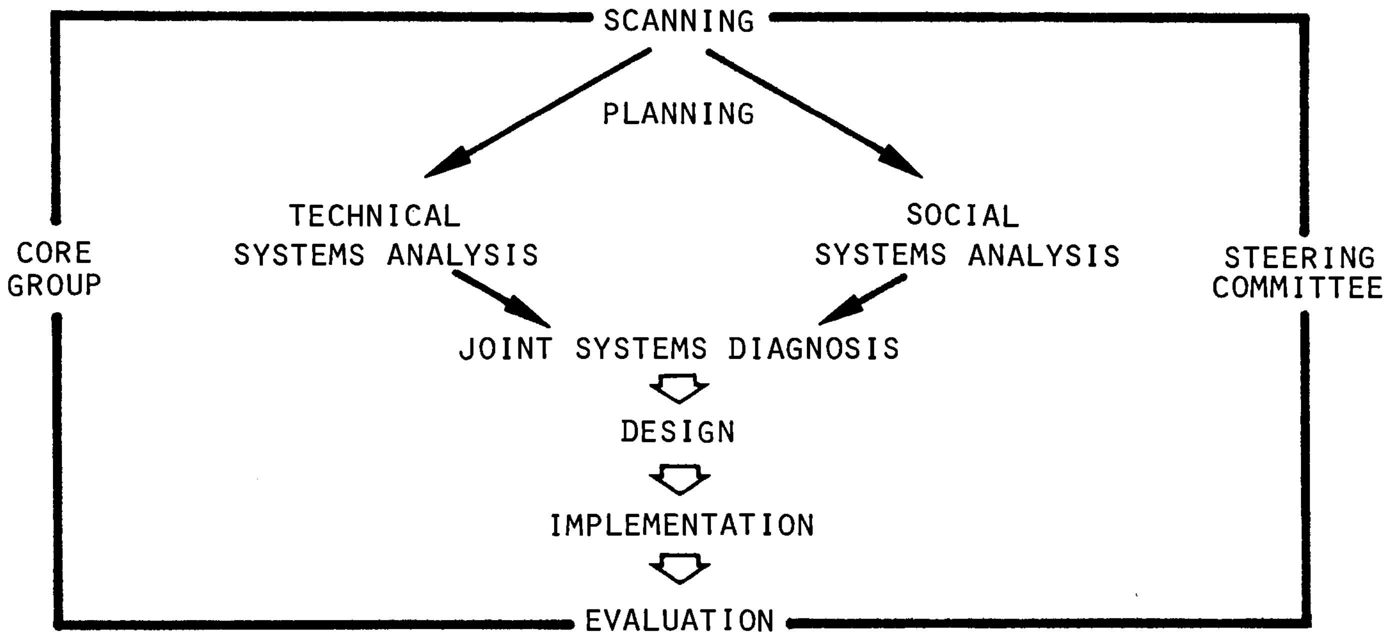


OUTCOMES

- SATISFACTION
- PRODUCTIVITY
- ADAPTIBILITY

The application of socio-technical systems theory by an OESO to ensure that the social and technical systems are mutually supporting, achieving synergy and therefore, in joint optimization involves a step-by-step process which is described by the model below:

CONCEPTS DEVELOPMENT EXPERIMENTAL APPLICATION
of
SOCIO-TECHNICAL SYSTEM THEORY



An explanation of the actions/activities involved in implementing the above model follows:

<u>SOCIO-TECH SCAN</u>

- The purpose of the scan is to get an overview of the organization as a socio-technical system and to identify current problems with the organization.

- The scan covers:

  -- Organizational boundaries.
  -- Who and what is inside those boundaries.
  -- The interfaces the organization has with its environment.
  -- The outputs of the organization.
  -- The inputs to the organization.
  -- The social purpose of the organization.
  -- Problems currently presented by the organization.

1. Purposes of scan

   a. To bring target organization into focus.

   b. To define relevant system and environment.

   c. To develop initial systems description of organization or sub-unit.

2. Scanning as Intervention

   a. Questioning is a form of intervention.

   b. Implementation begins with first inquiring steps -- therefore,

   c. Must consider future effects of initial actions.

   d. Must consider who "owns" the problem and whose organizational lives we are tampering with.

   e. Scanning as part of participative design process.

3. Scanning as a process

   a. Initial view - Ackoff's "mess"; unsorted picture of organization.

   b. Make sense of picture by structuring it according to socio-technical model.

   c. Scanning sets up tentative map of target organization as a system.

4. Elements of system

   a. Boundaries.

   b. Inputs/outputs/throughputs.

   c. Transformation.

   d. People in system.

   e. Environments.

   f. Objectives.

   g. Problems.

5. Boundaries

   a. Boundary regulation -critical system function.

   b. Boundary defines what is within and without target system.

   c. Minimum system is socio-technical system.

   d. Boundary setting criteria:

      (1) Rate of interaction within unit compared to between units. Simplify internal effects when considering unit as part of greater system. Examples: payroll department, restaurant kitchen.

(2) Definable transformation processes.

(3) Border across which inputs and outputs flow - change of ownership.

(4) Technology, time, territory.

e. Critique existing organization boundaries:

(1) Do not accept as givens

(2) Clearly defined organizational boundaries often mask poorly defined system boundaries.

f. Re: field sites.

6. Inputs

a. Materials, people, information or combinations.

b. Inputs may be defined differently by various organization members.

c. Problems and variations in inputs.

7. Outputs/throughputs

a. What is the product or service?

b. How is it understood in terms of input?

c. What problems are associated with outputs?

8. Transformation process

a. What is it? How does it relate to inputs/outputs?

b. Problems with transformation process.

9. People

a. Who is part of system?

b. How does the organization structure relate to system?

c. What people outside system are directly affected by it?

10. Environments

a. What are environments that impact on system?

b. What are impacts of technological, political, customers, legal, work force environments?

c. What other parts of organization are relevant environments of system?

11. <u>Objectives and purposes of system</u>

    a. What are they? Economic, social, technical?

    b. Who defines them?

    c. How are <u>results measured</u>?

12. <u>Problems</u>

    a. Presenting problems as information.

    b. Problem definition as function of model. Example: human error versus system problem.

    c. Within system problems.

    d. Problems between system and environment.

13. Re: <u>Field site scan</u>

<u>SOCIO TASK ANALYSIS</u>

1. <u>Overview of area of responsibility</u>

    a. List each role and describe the responsibilities associated with the role.

    b. List skills needed to perform role.

    c. For each role, state whether current employees possess the necessary skills.

    d. List training activities provided for the holders of each role.

2. <u>Problem assessment</u>

    a. For each role list:

        (1) Tasks performed in role.

        (2) Describe the nature of each task listed.

    b. Determine if the task is:

        (1) Required.

        (2) Discretionary.

    c. Determine if the task is completed:

        (1) Independently.

        (2) Cooperatively.

d. Identify key activities required to perform task adequately - include:

(1) Information needed.

(2) Tools required.

e. For each activity identified (step 3 task), state how the individual receives feedback on the quality of his/her performance.

f. For each activity list any problems that normally arise in the performance of work.

g. For each problem listed, specify:

(1) Who identifies the problem.

(2) Who is involved in solving it (list all).

(3) What information is needed in the process.

3. <u>Role research</u>

a. Examine the rewards for each role - looking at:

(1) Task variety.

(2) Meaningfulness of an overall task.

(3) Individual freedom to establish work standards.

(4) Suitability of feedback on individual task performance.

(5) Extent role requires skills worthy of respect.

(6) Extent role holder perceives contribution leading to an end product.

(7) Role holders' interdependence upon others.

(8) Extent tasks are simple or repetitive.

(9) Extent of cooperative work effort required.

(10) How important is the work to the success of the organization.

b. List rewards role holder typically receives.

c. List rewards role holder is offered for outstanding work.

d. List sacrifices, costs or cause of dissatisfaction role holders experience during work.

e. Evaluate the equality of the contract between the role holder and the organization.

4. <u>Area assessment</u>

   a. List goals for work area.

   b. Evaluate how well goals are being met.

As indicated on the outer boundaries of the socio-technical systems model, there is a core group and a steering committee. These two groups may or may not be used; however, an explanation of possible groups and their roles is provided for consideration when using the socio-technical systems approach.

ROLES IN THE SOCIO-TECH APPROACH:

- Task Force — Perform the analysis and come up with the new design.
- Consultants — Provide appropriate training and help keep the task force on track.
- Support group — Examine the implications of the task force findings on others and provide active support, as needed.
- Management — Evaluate proposals, define minimum constraints on redesign and provide support, as needed.
- Other members of the organization — Give input to the task force and evaluate proposals from their point of view.

After analyzing both the social and technical systems, the next step is socio-technical design. The principles of socio-technical design are:

THE PRINCIPLES OF SOCIO-TECHNICAL DESIGN

1. Compatibility with organizational objectives.

2. Minimum critical specifications.

3. Sociotechnical criterion of variance control.

4. Multifunctional principle of organism versus mechanism.

5. Boundary location for information sharing.

6. Information flow to point of action.

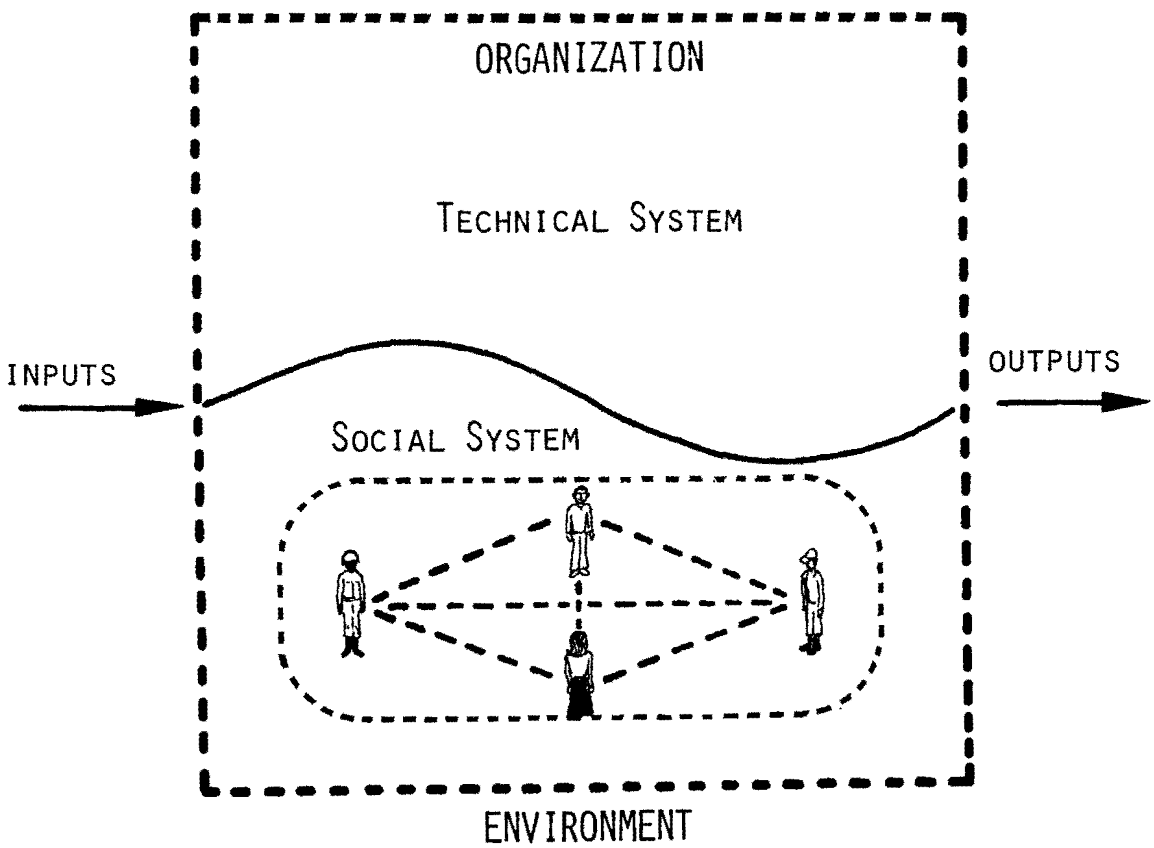
7. Support congruence with organizational design.

8. Design and human values.

9. Design incompletion.

Once again, remember that the socio-technical systems approach to organizations is a way of analyzing what an organization needs from a people point of view and from the point of view of getting the job done. It leads to redesigning the organization to make it more effective in getting things done as well as making the organization a better place to work.

Upon completion of implementation, the socio-tech model of the organization might look like this:



Measures for evaluation of the socio-technical evaluation are divided into three areas. These areas and considerations are listed below:

NEW ECONOMIC MEASURES FOR EVALUATION

1. Operational - regular operating flows

   a. Benefits of reduced scrap and waste.

   b. Benefits of reduced absenteeism/turnover.

   c. Cost/benefits of supervision.

   d. Cost/benefits of maintenance.

   e. Cost of increased wages.

2. Systematic - longer term capacity to adapt

   a. Cost of physical plant, space, inventories.
   b. Costs of covering "initial dip."
   c. Costs of "consulting time" and consultants/
   d. Costs/benefits of training.
   e. Benefits of ability to respond to changing markets.
   f. Benefits of improved customer relations.

3. Societal - received by society as a whole

   a. Effects on health.
   b. Effects on family life.
   c. Effects on citizen involvement.
   d. Lower personnel requirements and higher unemployment.

HUMAN MEASURES FOR EVALUATION

1. Individual measures can be created participatively

   a. Meeting psychological job requirements.
   b. Meeting invidivual needs for life satisfaction.

2. Social measures follow from the STS design (interpersonal relations are seen as important)

   a. Goal attainment - controlling key variances through cooperation, coordination.
   b. Adaptation - achieving group norms in dealing with external environments.
   c. Integration - achieving group norms in coping with interpersonal stress and friction.
   d. Long term development of latent abilities - achieving group norms in individual growth, skills development, group maturity, adaptability.

PERFORMANCE MEASUREMENT FOR EVALUATION

1. STS key variances:

   a. Focus on throughput is relevant to industrial engineers, supervisors, production management and operators.
   b. Appropriate as systems measures and as individual measures.
   c. Participative design enhances relevance and application.
   d. Compatible across occupations.

2. <u>Conventional measures</u>

a. Individual task performance created by industrial engineers.

b. Individual output created by supervisors.

c. Aggregated output created by production management.

These three are not compatible; they are not fair, comparable, relevant; they are not systemic.

The conference attendees expressed a desire to be kept abreast of the operations strategized during the conference. In an effort to honor this request, future issues of THE COMMUNIQUE will include an explanation of each operation and the progress being made.

In conclusion, socio-technical systems theory and methodologies are viable tools for use by OESOs in their continuing effort to increase productivity and force readiness for our Army.

The Commander Designee

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I. Introduction

Since March, 1979, I have served as team chief for a three man team from OECS which instructs at the pre-command course conducted at Fort Leavenworth, Kansas. During that time, I have gotten to know over 300 Battalion level and 60 Brigade level commander designees. I'll tell you a little about the exposure to organizational effectiveness which these officers get at the pre-command course, then I'll attempt to paint a picture of this student--soon to be commander--soon to be your sponsor.

The commander designees attend the two week Fort Leavenworth phase of the pre-command course after completing two weeks at their respective branch schools (Benning, Rucker, Sill, Bliss, Knox and Belvoir). With a few exceptions, they assume their commands three days to three months following the pre-command course. Until January 1980, only combat arms commander designees have attended the Fort Leavenworth phase, but during CY 80 combat support and combat service support commander designees will be gradually infused into the course.

My involvement with these commander designees has been on several levels. I present a short briefing on organizational effectiveness and the role of the OESO. With the help of a FORSCOM commander who's used one, I familiarize these officers with the change of command transition meeting. Working in small groups, my team members and I present the concept of a situational leadership, to include having the commander designees take the LEAD Self. We help them identify and discuss the leadership dilemmas facing them, we conduct an optional-attendance time management workshop for them, and we assist

Colonel Mike Malone by facilitating an ethics workshop designed for these officers. Finally, since September 1979, we have conducted assessment of the process performance of battle staffs during their Combined Arms Tactical Training Simulator (CATTS) exercise. This allows us to model combat related OE for them.

More importantly, perhaps, than my classroom involvement with these officers has been the time spent socializing. We eat together, jog together and drink together. It's through these informal sessions that I've gained the most insights into these commander designees; insights about their concerns, their uncertainities, and their fears. I believe I've gotten a fair picture of what causes some to be receptive to organizational effectiveness, and what causes others to be skeptical, even resistant to the OE effort.

I don't profess to be an authortiy on the commander. You OESOs in the field certainly know the commander more intimately than I. I do, however, have a good feel for what that commander is like BEFORE HE GETS IMMERSED IN THE ENVIRONMENT IN WHICH HE'LL COMMAND. I've got to say one more thing in the way of introduction. I, too, am a commander designee and will assume command of a battalion in May. I would be naive to believe that I haven't projected some of myself into this article. By recognizing that, I've made every effort to present what I've observed, not necessarily what I feel.

II. What He's Like*

The commander designees I've met have been refreshingly diverse. The stereotyped cigar chewing, white-sidewalled commander is not there. I respect the selection boards for recognizing the talents in these diverse personalities. Now that I've said he's not cut out of a common mold, I'll attempt to identify those common threads which will allow me to generalize somewhat about him.

He's dedicated and motivated. He's on his way to the assignment which he feels is what the past 15-20 years has been preparing him for. He wears an almost permanent facade of self-assurance. Under that facade, however, he's got a lot of uncertainties, uncertainties which surface as "leadership dilemmas" in our leaderdhip seminars. Some of the recurring dilemmas which are voiced and discussed follow:

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*I recognize that there are female battalion and brigade level commanders in our Army. I'm using the male pronoun throughout the article because, dealing with combat arms commander designees, my association and therefore my reference base has been entirely with male commanders.

- How am I going to effectively use my CSM, XO?

- How do I set standards and how high should I set them?

- How can I balance family life and the unit?

- What is my position on the use of drugs?

- When do I fire a subordinate?

- How many times can I allow my subordinates to make mistakes (knowing they're learning much from their errors)?

- How can I provide adequate guidance without micro-managing?

- What role should my wife have?

A frightening number of the battalion commander designees are on their way to lead every member of their battalion. I identified this by randomly asking them what the term "group" meant to them on the Hersey and Blanchard LEAD self instrument. While most said their "group" meant the staff and subordinate commanders, a surprising number immediately responded that it meant "My battalion, of course". The average LEAD self score for these officers taking this instrument between March and July 1979 was:

S1	S2	S3	S4	Effectiveness
2	6	3	1	+9.76

A total of 93.3% of the participants had a positive effectiveness/adaptability score.

The commander designee is concerned about his career and is keenly aware of the effect this upcoming tour will have on his career. Beyond that, I'm unable to generalize on how he plans to behave to deal with that concern. A number of these commander designees contend they plan to have fun, resist being over-managed and not get overly concerned about the boss. A greater number, however, appear very cautious, conservative, and ready to march precisely to the beat of the brigade commander's drum. We preach that "behavior is believable" and the behavior in class is that never once have I heard one of the Battalion commander designees openly disagree with a position presented by one of the 06s (Brigade commander designees).

III. The Commander Designee and OE

The commander designee is concerned that his use of OE will indicate a weakness in his ability to command his unit. Perhaps this is why he's receptive to the change of command transition model, since it occurs at the beginning of his tour and therefore cannot be construed as a call for help to "get me out of a jam".

The things a commander designee needs to hear and observe about organizational effectiveness are:

- That he's got all the perogatives (to hire the OESO, fire and tailor the effort to his needs).
- That OE can be presented in his terms, in his frame of reference. Try equating the steps in OE to an operations order, or to the commander's estimate of the situation.
- More of the management science end of our business and less of the behavioral science.
- That assessments gather both negative and positive information for him.
- That the OESO is a professional soldier, who looks behaves and can relate to him as a fellow comrade at arms.
- That OE is not another people program like EO. He's had some bad experiences in previous "programs" and needs to be told what's different about our effort.

IV. Summary

The commander designee is an individual who's almost overwhelmed by the awesome responsibility facing him. He's searching to put together his leadership philosophy and to get answers to the myriad of unanswered questions he has. As he walks into that Battalion or Brigade, he'll have gotten a pretty good handle on that leaderhip philosophy and will have most of the answers to his uncertainties. How much the environment of that command may cause him to abort all those well thought out plans, I don't know. My guess is that a great number of things about this individual appear to change once he's actually in the position. Perhaps, just perhaps, this sketch of the commander designee will help you not only to know your commanders better, but will also help you deduce much information about the environments in which your commanders are working.

Professional Dilemmas of the Psychologist in an Organizational Emergency

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ABSTRACT: The limitations of the common models of organizational development (OD) when applied to organizations undergoing an extreme emergency are discussed in light of the authors' experiences as front-line psychologists in the 1973 Israeli-Arab war. The working assumptions underlying common OD cannot be met in an emergency, hence another approach, emergency organizational development (EOD), is proposed. It differs from OD in orientation (direct problem solving rather than facilitation of changeability), work methods, and the conception of the psychologist's role. In addition to laying the first foundations toward the development of an EOD conception, the authors describe and discuss some of the most pressing personal problems and professional dilemmas facing the psychologist who is expected to provide psychological services to an organization in an extreme emergency.

The authors' names appear in alphabetical order, reflecting equal contributions to the article.

The authors wish to thank Martin Lakin, Stephen J. Morse, and Michelle Fine for their helpful comments, and Amnon Caspi for his indispensable cooperation in making this paper possible.

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Organizational psychology literature provides models conceptualizing the work of the organizational development (OD) psychologist (e.g., Bennis, Benne, Chin, & Corey, 1976; Schein, 1970). The various models share basic conceptual assumptions regarding the nature of "healthy" and "unhealthy" organizations, the major goals and objectives of OD, and the ways of evaluating outcomes of OD interventions (Argyris, 1970; Beckhard, 1969; Bennis, 1966, 1969). Having been called to serve as front-line psychologists with the Israeli armed forces during the 1973 October war, in the capacity of organizational (and not clinical) psychologists, we discovered the shortcomings, often even irrelevancies of common OD when applied to emergency situations. Faced with organizational crisis, extreme stress, rapid locomotion, and other manifestations of the emergency setting, we had to experiment with new modes of organizational work that differed radically from those prescribed by common OD models. These new ways of coping with organizational emergency we came to label emergency organizational development (EOD).

This article has two major purposes: The first is to delineate and discuss the personal problems and professional dilemmas facing the psychologist who is called to help an organization undergoing extreme crisis. These problems are caused by the stress situation itself (of which the psychologist is part) and by the absence of adequate prescriptive models of EOD. Neither the OD literature (e.g., Fink, Beak, & Taddeo, 1971) nor the crisis intervention literature (e.g., Church, 1974; Parad, 1974) deals satisfactorily with the psychology and dynamics of the psychologist in such situations. The second purpose of the article is to distinguish between OD and EOD and to lay the first foundations of an EOD model to complement common OD models.

We do not wish to criticize the common OD models in and of themselves, nor do we present in this article a complete model of EOD (see Greenbaum, Rogovsky, & Shalit, 1977, for one attempt of this sort). Rather, this article is a reflective attempt to draw from our personal experiences as front-line psychologists some generalized principles that might guide the construction of an effective EOD model. We may add that while some of our conclusions are still debated in Israel, our observations were shared by numerous friends and colleagues who observed in 1973 in a similar capacity.

We focus on wartime experiences, but the personal and professional dilemmas presented are relevant to emergency situations of other types and to numerous situations in clinical, community, and organizational practice. The war setting served to sharpen known dilemmas and make the conflicts more acute. On the other hand, we are aware of the fact that the global picture we present cannot be readily generalized to other emergency situations. Different emergencies have unique and distinct characteristics, and our specific observations would vary greatly in their applicability to different situations.

THE EMERGENCY SETTING -- OD VERSUS EOD

OD is usually defined as an educational strategy designed to bring about planned organizational change. This conception is based on several assumptions that cannot be met in emergency settings. The following OD assumptions are particularly inappropriate for EOD:

1. There should be sufficient time to advance systematically through the various necessary stages of organizational work (information gathering, diagnosis, contracting, strategy planning, intervention, evaluation, and follow-up).
2. "Change" should be planned to effect all relevant parts of the organization. The work should be collaborative, and the interventions, well coordinated.
3. The identification of the client is an essential component of the attempt to effect "planned change." It is implied that the (relevant and appropriate) client is emotionally balanced and "changeable" to a sufficient degree and is willing and capable of working with the psychologist.
4. The OD consultant is relatively free of irrelevant stress, maintaining a level of distance from his or her clients and the organizational problems. For effective OD work, the psychologist cannot be an integral part of the client organization. Moreover, his or her work is to be conducted in an appropriate physical and psychological setting.
5. Ongoing evaluation is an integral and necessary part of any OD intervention, allowing, among other things, midcourse corrections and contractual changes.

None of these assumptions (or requirements) can be met in a wartime emergency. The front-line situation is characterized by extreme fluidity, commotion, confusion, and a sense of urgency (sometimes even of forthcoming calamity). Most soldiers and officers in the field have limited information and lack a perspective of the "global picture," while rumors spread like brushfires. The imminent dangers and the continuous confrontation with life-and-death issues arouse strong, raw emotions, and yet utmost efficiency is required at all times. In addition, most individuals are constantly tired and anxious, and the "operative" pressure is very strong. The units of the fighting army are in constant locomotion, shifting in and out of the psychologist's reach. Therefore, psychological interventions can be only of a very brief duration, the psychologist's work is very sporadic, and the whole sequence of stages prescribed by the common OD models can never take place.

The key clients (commanding officers at the different levels) are not always easily identifiable. Even when identified, they are often inaccessible to the psychologist, being overloaded with more urgent and immediate operational tasks. Moreover, even when accessible, they are often unable emotionally to become suitable collaborators for OD intervention.

Probably the major characteristic of the EOD setting is the fact that the psychologists are an integral part of the organization, unable to dissociate themselves from its crisis. They are exposed to many of the threats and emotions affecting their clients, and their work is often carried out under an immediate threat to their own safety. The majority of EOD psychologists who served in the front lines in the 1973 war reported having experienced emotional difficulties throughout the fighting period. In addition to the problems encountered by most men in the front line (anxiety, safety, death, lack of perspective, etc.), the psychologists faced two major, distinct problems. The first was guilt for not being directly involved in the fighting, playing instead a "safer" role of dubious efficacy. This feeling strengthened the psychologists' need to produce immediate and visible effects that would "justify" their role. The second factor was the psychologists' need for belongingness and compassion, since -- unlike most soldiers -- they were operating in the field on their own (alone or in pairs), with no directly available peer group or framework to which they belonged.

Lacking prescriptive models of emergency functioning, the psychologists did not have a clear image of what constituted "normal" (or "healthy") functioning in the emergency setting. Given all of the above, we often found ourselves identifying crises and "organizational pathologies" which were (in retrospect) no more than bureaucratic confusions (Fink et al, 1971) characterizing organizational crises. It may be added, parenthetically, that it eventually became apparent that numerous behaviors considered "unhealthy" under non-emergency conditions (e.g., suppression) were very "healthy" in crisis, and vice versa.

We are aware that this characterization of the wartime emergency setting is far more extreme than most other organizational emergencies (such as the breakdown of a company, natural disasters, or urban unrest). Undoubtedly, only some of the elements we have described are relevant in each case. However, an effective EOD model must take into account (a) the boundaries and limits posed by emergency settings, and (b) the emotional problems and the professional dilemmas of the EOD worker.

ORIENTATION AND CONTENTS OF EOD

The basic orientation of EOD is identical to that of common OD: to serve the entire organization and help improve its functioning. This implies (a) that the "client" would most often be a subunit of the organization and not an individual, and (b) that the EOD psychologist should serve the functioning parts of the organization and not the casualties. Thus, the role of the EOD field psychologist is distinct from the clinical crisis-intervention role played by mental health workers in the medical corps. EOD psychologists must be capable of doing relief work, and they may indeed be required at times to treat mental casualties (shell shock, combat fatigue, etc.). However, their major responsibility is to serve the functioning parts of the organization (i.e., those individuals and groups expected to continue carrying out the missions and operational tasks) and not the casualties. Referring the psychologist mostly to the mental casualties, and the psychologist's own preference for that direction, can be understood but not justified. From the client's point of view, such referrals stem (a) from the high visibility of the mental casualties, and (b) from the clarity of the image of the "therapist" as compared to the unclear (or nonexistent) picture of potential EOD services. From the psychologist's point of view, working with the casualties is a socially desirable utilization of his or her knowledge and a way of reducing guilt and stress, especially in light of the absence of clear prescriptive models of EOD.

In its orientation, OD is an educational (re-educational) undertaking, aimed at promoting "changeability" within the client system. The OD psychologist is a facilitator who helps the client realize his or her own potential for change. The major task of OD psychologists is to assist clients in probing and processing, and what little "directive" work they do is mostly limited to skill training. Moreover, OD work is by and large interpersonal-relations-oriented and thus often probes into psychological layers that underlie the observable difficulties. The orientation of EOD is by necessity one of direction action - consultation aimed at immediate and rapid problem solving, with no intention of facilitating long-range changeability and growth of the client. Thus, whereas common OD is mainly adaptive in its orientation, EOD is mostly adoptive, geared to the immediate solution of problems and the mitigation of difficulties (Sashkin, Morris, & Horst, 1973). EOD psychologists are neither "process facilitators" nor "skill trainers" but direct consultants and advisors who are often required to make decisions and take far greater than the usual responsibility upon themselves.

The demand for direct responsibility is crucial in EOD. Field psychologists were constantly asked for opinions, advice, or recommendations, and this was not the time "to process" the client's needs and underlying problems but to provide immediate and direct answers based on the best professional considerations. Even when conducting training activities (and EOD psychologists were often asked to provide "instant training" to various officers and groups), the training had to be far more directive and prescriptive than common OD training.

The major content areas of EOD (e.g., personnel assignment and reassignment, morale, information dissemination, clarification of trust and confidence issues, etc.) are quite similar to the contents of organizational work in general. However, in EOD, these problems cannot always be viewed in the perspective of the overall organizational picture, and specific contents may gain unproportional salience in particular instances (e.g., the on-the-spot promotion of a young and inexperienced officer to replace an admired commander who was killed, as experienced and reacted to both by that person and by the soldiers who must fight under his command, and as "treated" by the psychologist). Moreover, EOD must deal with the extreme emotional stress, the instability, the uncertainty, the fear and anxiety reactions, and the mental fatigue of soldiers who are expected to continue fighting. Thus, while under nonemergency conditions crises can be turned into means for "educational" ends, in EOD their immediate solution (or mitigation) is the end itself. Thus, procedural rather than psychological solutions need often to be sought, sidestepping the tendency to probe into motivational, attributional, ego-defensive, and other psychological layers. For instance, on-the-spot changes of role definitions are preferred over the resolution of interpersonal conflicts.

ISSUES RELATED TO EOD WORK METHODS AND ORGANIZATIONAL PROCESSES

In this section we raise some issues and professional dilemmas related to the actual practice of EOD. Since 1973, steps have been taken in Israel toward the construction of EOD models, and initial policies and procedures have already been formulated, while other issues are still in active debate. As in the earlier sections of this article, we maintain that the basic dilemmas we discuss are not limited to EOD but are central to most areas of community and organizational psychology. At the same time, it is our intent to demonstrate the unique salience of these problems in EOD.

The shift from adaptive to an adoptive orientation changes the meaning of "effectiveness." In EOD, apparent effectiveness (Reddin, 1970) and short-range problem solving are crucial, rather than the facilitation of "changeability." Psychologists cannot leave the responsibility for change with the client. Instead, they must often make decisions themselves, propose lines of action, and sometimes even implement change on their own. Typical "psychological" interventions such as "tell me what *you* think" or lengthy processing of the client's needs and hidden agendas are generally inappropriate, and psychologists must be less concerned with presenting the client with reasons for and against given lines of action. Instead, they must weigh the odds and make a decision, presenting the client only with the chosen solution. This was often the case even when it was apparent that given problems reflected undercurrents that would have to be "processed" if the setting were different. For example, numerous officers withheld from their soldiers whatever little "global" information they possessed, rationalizing this behavior with a variety of reasons (e.g., "the information might depress the soldiers" or "everyone should mind only his own angle") and being generally unaware of the negative outcomes of informational deficit. While processing the covert reasons for withholding information could have been a fruitful source of insight, we were typically compelled by the conditions of the emergency setting to propose directly what immediate action should be taken. Even when some processing was possible, it was of a more explicit and direct nature than is common in regular OD.

In the 1973 war, the problem of "OD versus EOD" was intensified by the fact that the EOD work was the first actual "entrance" of the psychologists into the units. Until then, the reserve fighting units were not provided at all with OD services. As a result, the EOD psychologists had to cope with problems of entering the units and establishing themselves, identifying clients, and initial contracting, in addition to the problems posed by the emergency setting and the absence of an appropriate EOD model. Moreover, the psychologists had to establish themselves in a given unit <u>and</u> intervene, all at once within a very short period. Thus, the intervention itself often was the "instrument" by which the psychologist established himself in a unit - a fact which tended to decrease the effectiveness of those interventions and to maximize the psychologist's pressure.

Since 1973 (and due in large part to the pressures and demands of the field psychologists), a <u>continuity model</u> has been conceived and applied. According to this model, the psychologist is permanently attached to a number of reserve fighting units as their OD consultant, providing services in nonemergency <u>and</u> emergency periods. The advantages of this model are very apparent: The psychologist knows the organization; the clients and the various resources are initially identifiable; the psychologist's role and goals are clarified (supplemented by the means for achieving these goals); <u>and</u> the psychologist is known and initially accepted by the clients. This model is expected to minimize the scope and intensity of various problems encountered in 1973 and is undoubtedly one major foundation of EOD. However, numerous problems still remain unresolved, stemming both from the general commotion, extreme time shortage, continuous reassignment, and other characteristics of the emergency setting, and from the absence of a clear, prescriptive conception of what constitutes optimal or effective functioning in an organizational emergency. A partial list of such problems would include (a) misidentification of problems; (b) clients' lack of awareness of the scope of their needs and problems, and their inability to set priorities for the psychologists' work or to utilize their services most efficiently; (c) diversion of attention to highly visible but marginal problems (such as attending only to particular individuals, subunits, and/or casualties); and (d) psychologists' needs for acceptance and belongingness, which might lead to unwarranted compromises in their EOD work.

Suspicion toward the psychologist as an outsider of questionable loyalty and as an "agent" of the higher echelons is a universal phenomenon. Such feelings are particularly strong in the military, since it is a basically "nonpsychologically" oriented organization, and since the demands for "total leadership" are interpreted to imply that the commanding officer must be the best psychologist, thus precluding outside, expert assistance. These feelings are even further intensified in an emergency, where the long common history and cohesiveness of the soldiers are multiplied by their mutual stress and the hardships they have experienced together, while the psychologist is an outsider. A history of "help sharing" with the psychologist (in line with the new OD-EOD continuity model) may lessen these suspicions but never eliminate the problem totally. This ambivalence has additional facets in an emergency: The need for expert help is more apparent and more strongly felt, arousing resistance on the one hand and anticipations of "omnipotent magic" on the other. Unfortunately, EOD psychologists have no alternative but to reinforce this ambivalence (thereby increasing their own difficulties): They are indeed outsiders and must remain so; they are a threat to the designated leaders in their (kind of) "surrogate leadership" position; they have double or multiple loyalties; and finally, they must often shortcut a long process of information gathering by drawing from their previous experience in other units and identify immediately the major problems requiring their attention in a given unit. By doing that, they reinforce the anticipation of "omnipotence."

One dimension of psychologists' independence gains particular significance in EOD - the fact that their role enables them to be one of the very few who can maintain easy access to all levels of the organization. Psychologists can "cut" across levels of authority and address a problem directly at the relevant echelon, while most other role holders can only act "through channels." In an emergency, communication regarding less than top-priority issues is curtailed, and information concerning "psychological" aspects of functioning flows between the levels of the hierarchy only when extremely crucial. As a result, many decisions are made at the top echelons on the basis of unchecked assumptions and nonexistent information regarding morale, functioning ability, self-confidence, and trust of particular units. Moreover, the few sources who succeed in reporting such information are often biased and uninformed themselves. Through their direct access to all levels of command, psychologists can fill the informational vacuum somewhat, providing decision makers with reliable and relevant information. Being professional and independent, their information is at times quite valuable, regardless of whether or not they choose to be participants in higher level decision making. However, this very fact serves to increase the suspicion and mistrust from the lower echelons that was discussed earlier. It was our experience in the 1973 war that some of the most significant instances of productive EOD work stemmed directly from this easy access of the psychologists to the higher echelons, particularly in light of the fact that they were able to observe and collect relevant information within the units and subunits of the fighting army.

OUTCOME EVALUATION IN EOD

Outcome evaluation is an integral part of OD work. Indeed, where organizational change is planned, outcome evaluation accompanying all interventions is both desirable and possible. In EOD, outcome evaluation constitutes a major problem, and systematic data collection is simply impossible. Change is not planned, time is an unavailable commodity, and interventions are short-term, sporadic, and often superficial, never coordinated to affect the entire organization nor even to deal with all aspects of a given problem. The psychologist's interventions are always overshadowed by events of far greater significance, and psychological interventions cannot be expected to bring about long-range effects. Moreover, since EOD work is not "educational" but specifically oriented toward immediate problem solving, no overall "change," "learning," or "transfer" can be expected to take place. Finally, outcomes cannot be evaluated in the absence of (a) a clear conceptual image of "healing" or "normative" behavior in an emergency (Glass, 1956) and (b) explicit sets of change goals.

While outcomes in themselves are always important to the clients' and the psychologists, in EOD, outcome evaluation is particularly important to the psychologists, who - in light of their emotional states, professional dilemmas, and conceptual "void" - need unbiased indications of effectiveness. The pitfalls we are about to describe are universal, but they gain particular significance in situations where systematic evaluation cannot take place, and where psychologists must fall back on sporadic information and, mainly, their own intuition.

The personal acceptance of psychologists may get mixed up with their professional effectiveness. The extent to which EOD psychologists are "accepted" by units and clients may indicate their success as people but not necessarily their professional impact. The two may be somewhat correlated, but in some instances of EOD, personal acceptance may even be a counterindication of professional effectiveness. The identification of personal acceptance as professional effectiveness is an example of what might be called "the failure of success." It involves imaginary effects that - although manifestly appearing to be of significance - do not indicate a meaningful change or a real resolution of problems. A client's expressed satisfaction may serve to prevent the psychologist from a more critical evaluation. Chances for "failure of success" are great in EOD, since (a) everything around is so chaotic, (b) the psychologist is more "needy," and (c) such satisfaction is typically the first message to be transmitted. On the other hand, given the limited goal orientation of EOD, expressed satisfaction (and "relief") may at times be the expected EOD outcome.

Complementing the "failure of success" is "the success of failure," where the psychologist perceives failure although the outcomes are in effect successful. Psychologists' analyses of a situation are often met with defensiveness and rejection, and lacking time, the psychologists must abandon the problem (and often, these particular clients). However, fermentation continues in the minds of those clients in which a cognitive imbalance has occurred, but the psychologists are not aware of it. Similarly, whereas the psychologists attempt to implement manifest change and fail, it is often their sheer presence, their orientation, and their interest in their clients' well-being that may produce a more significant yet latent change of which they are unaware. "Success of failure" is often characterized by a "sleeper effect," as when the client "invents" a solution after a period of incubation. It seems to us that such effects occur more frequently in the military, where the designated leaders - who are often competing with the psychologists - adopt a more "psychological" orientation to prove that they are better psychologists and go to great lengths to deprive the psychologists of credit and to prove their usefulness.

In spite of these problems and pitfalls, EOD psychologists were continuously evaluating their effectiveness in 1973 (and have been since). Awareness of the sources of bias not only served to increase rigor and caution but also helped to clarify the perspective and some of the underlying goals and principles of EOD.

CONCLUDING REMARKS

In this article we have attempted to delineate some basic issues facing the psychologist who is expected to provide psychological services in an extreme organizational emergency. Focusing both on the conditions and limitations of the emergency setting and on the personal and professional dilemmas of the psychologist, we have tried to demonstrate the need for a comprehensive conceptual approach to organizational crisis. On the basis of our (and our colleagues') experiences as OD-turned-EOD psychologists under extreme conditions, we distinguished between OD and EOD in terms of setting, basic orientation, work methods, and outcome evaluation, emphasizing both the inadequacy of common OD models for emergency situations and the scope of the _psychologists'_ crises.

We did not present a comprehensive model of EOD, and we are sharply aware of the need to further delimit EOD, to specify its range of utility, and to develop a relevant and appropriate work methodology. Undoubtedly, an EOD conception will have to integrate knowledge from OD, crisis intervention, and community psychology (e.g., Caplan, 1964; Sarason, 1974), as well as from other related areas. We are also aware that the setting we have described and its implications cannot be readily generalized, and different types of emergencies _cannot_ be lumped together under the umbrella of one comprehensive model. There cannot be one set of EOD strategies, and each type of situation will have to be addressed specifically. However, by describing an _extreme_ crisis situation and the experiences associated with it, we hope to have focused attention on the large variety of factors that _may_ operate (to a different extent and with different salience) in other crises. In a sense, EOD is a "deficiency state," and an effective model must prescribe possible lines of action in light of specific deficiencies.

In the continuous work since 1974 on developing EOD approaches (of which the "continuity model" we described earlier is but one part), we and our colleagues have discovered again and again that clear prescriptions and designated ways of coping with specific contingencies are much harder to plan for EOD than for OD, due to the extreme fluidity and the great variability of the emergency conditions. As a result, the EOD conception may remain no more than a "skeleton," leaving much to the intuition of the psychologist in the field. But that is a source of concern, since we have come to know the various potent sources of distortion affecting the EOD worker in the actual emergency.

Israel may face another (and possibly more intense) war at any time, and the military psychologists must prepare for possible emergencies. The variety of problems we have described in this article come to be felt most strongly when we attempt to design _training programs_ for turning OD psychologists into EOD workers.

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Say Again, All After...

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Any organization needs to be reviewed periodically to see that it is still appropriate for current needs. This is true both of the organization as a whole and of its individual parts. When doing so it is useful to remember some of the common mistakes that can be made in setting up organizations or that can develop with time. This article is intended as a brief guide to these mistakes. The questions can be used as a check-list to help expose particular mistakes.

1. <u>What objectives have been set? Do these cover all the main aspects of the organization?</u> The need to be clear about one's objectives has become almost a cliche. Yet any list of common mistakes must still start with it.

There are two dangers: one is that only lip service will be paid to the need, the other is that what is meant by objectives can be too general to be a useful guide to planning. For example, in the military it is not sufficient to say that one's objective is to be mission ready, as that leaves too many questions unanswered. Nor is it sufficient in hospitals to say that one's aim is to care for patients. What is needed is a series of objectives, covering each of the main areas of the organization's activities. In a combat unit these include, among others: the amount of time and level within the unit that will be dedicated to specific mission training; the specific measures that will be used to quantify the success of the training endeavors; the unit's standing vis a vis similar units; specific activities not directly related to training, i.e., post support, guard details, police call, etc. In short and in fact, the unit must define its objectives realistically and periodically with full consideration to the <u>current</u> environment that houses it.

Only when a unit has defined its objectives for the different areas can it decide what is likely to be the best form of organization to meet them.

Common mistake: Failing to start all organizational planning by asking, 'What are the aims?' Questions about what is the most efficient form of organization are meaningless unless this is done.

2. Is the form of organization suitable for the environment in which it has to operate? If the objective is well thought out this question should be superfluous. Yet it is worth including as an additional check on one's thinking.

Research has shown us that the form of organization should vary with the situation with which it has to deal. One of the most important variables is the rate of change in the environment. Where an organization is exposed to a very rapid rate of change it will need to be much more flexible than if it operates in stable conditions. This has a bearing on the degree of formalization of procedures and responsibilities that will be appropriate.

Common mistake: Designing an organization with too little thought for the environment in which it has to operate.

3. In the past few years how have the aims or circumstances of the organization changed? What are the implications of these changes for the type of structure? It is easy to let one's objectives get out of date and hence fail to adapt the organization to changing needs. For example, we may continue with the same recruitment and promotion policies long after changes in the civilian labor market have made them inappropriate. Large-scale employers like the military with its tremendous personnel turnover rate need to be particularly aware of changes in the composition of the population and in educational and social patterns, such as the proportion of school-leavers going on to the universities, the average age of marriage and childbirth, and the size of the average family, as these may all have implications for recruitment and promotion policies.

Some changes, such as TO&E and TDA changes/mergers, naturally stimulate leaders to think about organization. Other changes take place without leaders being fully aware of them or of the resulting need to adapt the organization. Units that are used in combat may take years to adjust to a peace-time role which requires much more active planning to efficiently use the time to perform and accomplish its objectives, which may, perhaps, require a larger and more decentralized operations section than it did in combat.

Common mistake: Continuing with a form of organization that is no longer suitable.

It is particularly important to be clear about the purpose of the job, and the nature of its responsibilities, when deciding who would be suitable to appoint to it. Such clarity can also contribute to job satisfaction, as most people feel happier if they know what it is they are supposed to be doing. Investigation may show that the duties of a particular job are seen quite differently by the holder, his boss, his peers and his subordinates. This may be due, at least in part, to a failure to define the purpose of the job.

Common mistake: Fuzzy thinking about the responsibilities of individual jobs.

8. (Looking at individual jobs) What is it like to be in the job? What are its strains, stresses and satisfactions? Some leaders rarely think enough about what it is like to work in a particular job. They sometimes need to do so in order to understand how people may react to it, and what the effect of these reactions will be on job performance. Research has taught us that quite different personalities may react in the same way to a particular job, and that reorganizing the job can change these reactions. The aim should be to design jobs that people will be interested in doing well.

Common mistake: Thinking too little about what it is like to work in particular jobs and of the need to take this into account when designing jobs.

9. What effects does the form of organization have on people's relations with each other? Research has shown us that one method of organization can create frictions and antagonisms between different individuals and groups, while another can encourage people to co-operate with each other. This is a lesson that is worth remembering wherever technology permits alternative methods of work organization.

Common mistake: Failing to realize that the form of organization chosen can have repercussions on individual and group behavior, and that these should be taken into account when considering the advantages and disadvantages of alternative methods of organizing work.

10. What are the relations like between line and staff? Complaints of friction between line and staff are common, yet much can be done to encourage good working relations between the two groups. Organizational clarity of the relationship is important. What is the specialist supposed to do? Who does he report to? Is he there only to advise, or are there some areas where he is responsible for deciding what should be done? These are questions that should be asked and clearly answered. Important too, are the attitudes of the two groups toward each other. Leaders should

4. Which decisions are most vital to success? Who is making and taking these decisions? Top leadership ought to determine which decisions are most important to success. These are the ones on which it should make the final decision. The danger is that top leadership will not have sought to identify the decisions that matter most, or that even if it has, it will not spend the time necessary to give them adequate attention.

Common mistake: Top leadership preoccupied with details and matters of secondary importance instead of concentrating on the most vital decisions.

5. Which decisions should be taken by those who have to implement them? There is much to be said for the view that decisions should be taken at the lowest level that is practicable. Many decisions are likely to be better if they are taken by those who know the local conditions and the people who will be affected. There are, of course, others that will be better for the wider perspective that a more senior person should be able to bring to the problem. Pushing decisions as far down in hierarchy as possible makes junior positions more interesting - the intention behind job-enrichment policies that some in the military are now pursuing. The implementation of decisions is also likely to be better as people will usually be more motivated to carry out their own decisions than those of others.

Leadership may fail to decentralize because it has not analyzed the nature of the decisions nor where they ought to be taken. Often leaders may take too many decisions themselves because they are reluctant to delegate.

Common mistake: Failing to realize which decisions are better taken at a lower level, or reluctance to delegate.

6. Is the grouping of activities satisfactory? Any organization is divided into subunits which bring together related types of work, but it is often a problem to decide what activities would be put together. Some activities, such as laundry in hospitals, may now be more economically operated as a central service. Others may need to be decentralized to the operating units.

Common mistakes: Failing to weight the pros and cons of different ways of grouping activities, and failing to review these periodically.

7. (Looking at individual jobs) Why does this job exist? What is its holder supposed to contribute to the organization? What are his/her responsibilities? Unless these questions are asked, jobs may be created that are unnecessary, or, more commonly, may survive after the need has passed, as in the story about the man who asked why there was a man in the gunnery team who apparently had nothing to do and was told, 'Oh! He is there to hold the horses.'

learn how to draw this professional knowledge without abdicating responsibility. The relationship is one that often improves with time as the two groups get more used to working with each other.

Common mistake: Poor staff-line relations leading to inefficient use of specialist resources.

11. What are leader's relations like? The effectiveness of an organization will depend, to a considerable extent, on the relations between individual leaders. Do they work well together, or are they distracted by personal jealousies and power struggles? Some friction is likely, and is probably healthy, but power struggles can be harmful to the pursuit of common objectives. The head of the organization should try to ensure that arguments are not conducted in a win-or-lose atmosphere.

Common mistake: Leaders who pursue their sectional interests rather than identify with a common purpose.

12. Are people getting the information they need? There are all too many ways in which communications can be unsatisfactory. There may be too much information, too little, or it may be the wrong kind. Leaders may be flooded with paper which they have no time to read, or even to distinguish what matters and what does not. Leaders may feel that their time is wasted in meetings that are too frequent and too lengthy. Or there may be the opposite complaints, that one never knows what is going on; that decisions are taken that affect one, but one is not consulted, nor even told about them. It is still worse where one receives the wrong kind of information; PLL analysis that is misleading; figures that are so far out of date that they are not a good guide to action, or information that is deliberately selected so as to give too rosy a picture of what is happening.

Information often has to be passed from one person to another, or from one part of the organization to another. The official channels may be slow and inefficient. Status differences may be a barrier to the free exchange of information. Then there are all the problems that arise from the fact that what I say may not be what you hear, so that the information may get more and more distorted as it passes up or down the hierarchy.

Common mistake: Too little attention to what information is needed and to what is the most efficient way of communicating it.

13. What thought is being given to career planning for leaders? What experience should leaders have and what are the best ways for them to get it? These questions should be asked in all organizations. The kind of experience that leaders have will be partly determined by the form of the organization. For example, young leaders are likely to get more responsibility in decentralized organizations than in centralized ones.

The extent to which sections and units are self-contained, each with its own career structure, will affect the opportunities that young men and women will have to get a wider view of the organization. The danger of occupational career ladders is that leaders will tend to have a narrow viewpoint, which can later be a handicap when they get to the top and have to view the organization as a whole.

Common mistake: Paying too little attention to career patterns and giving too little thought to the kind of experience that they provide.

Finally, there are contrasting faults of over-and under-organization, both of which may exist in different parts of the same unit.

14. Where is there too little systematization? Many organizations, particularly those that have grown rapidly, have too little formalization. Policies are not defined, people do not know what they should be doing, too little effort has been given to trying to devise standardized ways of dealing with certain activities. The result is muddle and uncertainty.

Common mistake: Too little attention to trying to systemize the work to be done.

15. Where is there too much formalization and unnecessary red tape? This is an appropriate mistake with which to end because it is the popular idea of what is wrong with many large organizations. There is a tendency for those that are already highly formalized to develop systems, forms and procedures for their own sake rather than for the purpose they should be serving. New committees, new procedures may be needed, but all too often the old ones are not reviewed to see if they still serve a useful purpose. Leaders may become infatuated with orderliness, thus forgetting the value of flexibility.

Common mistakes: An over-enthusiasm for trying to systematize the work to be done and the procedures to be followed, and a failure to review periodically the relevance of existing procedures.

The Americanization of Kamehameha*
Facilitating Intercultural Groups

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1. During the months of August and September 1979 a questionnaire was sent to all past participants of the USASCH OE-conducted Leadership and Management Development Courses (L&MDCs) with the stated purpose of providing the OE staff with data and feedback concerning its perceived value, work related and personal, and to provide information for planning future L&MDCs and other workshops.

2. In addition, my co-facilitator and I, had perceived a serious hesitancy by the groups to identify and deal with conflict issues during the life of group, and wondered if this carried through with graduates following the course. We also had concerns identified with the groups concerning participants conceptualization and ability to use group development skills such as FIRO and power, leadership and authority (PLA).

3. To gather the data the questionnaire was designed and mailed to 82 people. It became obvious almost immediately that there was a problem in selection of the survey audience in that we had a mix of two groups and no clear way to separate them. In this command, L&MDCs are given only under the title of Supervision and Group Performance,

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**KAMEHAMEHA I, first ruler of the combined kingdom of Hawaii. His reign during the 18th Century served to unite all Hawaiian people under the principle of Lokahi-harmony above all. Ho' oponopono, the problem solving process was totally the responsibility of highest leaders in consultation with the Gods.*

Phase II, which is a mandatory training requirement of the Civilian Personnel Office. There are two different delivery styles under this title, one a four day L&MDC followed on the fifth day by selected Civilian Personnel Office function subjects and the second, a 40 hour multiple subjects curriculum with OE having 8 hours. On the training roster listing participants there was no indicator which group participants were in.

4. Of the 82 questionnaires sent out, 51 were returned or 62%. Two of the returned questionnaires were insufficiently completed to use and were disgarded leaving 49 to be used for data purposes or 60%. The questionnaire was designed to minimize effort by the respondent and included a return addressed, postage paid envelope for return of the questionnaire. Because of the small survey audience and the stated purpose of the survey, it was decided that computer assisted analysis of the responses was not cost effective and therefore not used. The common aspect was supervision of civilian employees.

5. A breakdown of the valid responses is as follows:

a. Department of the Army Civilians (DACs):
(1) Male 32.
(2) Female 8.

b. Military 9.
(1) Male 7 (6 NCO's, 1 Officer).
(2) Female 2 (both Officers).

6. The study indicates that participants of the L&MDC, following exposure to the course, use Communication Skills and Teamwork most frequently, Management of Conflict and Theory of Group Development least often or never. Respondents indicate Teamwork and Goal Setting/Action Planning easiest to use with Personal Counseling and Management of Conflict leading the list as most difficult. When asked what should be dropped, those who responded at all to the question indicated Management of Conflict, Group Development and Personal counseling.

7. After reviewing the analysis of the survey data, I looked for some correlation to explain the results which supported our concerns of post-attendance performance. One aspect was striking, 82% of the participants were DACs. In Hawaii most of the DACs are of a variety of oriental cultural or mainland raised Westerners who have integrated into the local culture over a period of time. Armed with this information I began to research intercultural avenues.

It should be noted here that throughout the OE course I was constantly reminded that a conflict situation not identified, brought into the open and facilitated to closure would continue to be dysfunctional to the group. No mention was made of the possibility of this confrontation being more dysfunctional then the conflict itself. Following my experiences with several intercultural L&MDC groups I believe this definately can be the case. The former may be valid in L&MDC composed of U.S. soldiers; however, when the group is DACs in a basically eastern society, I don't believe it holds.

Edward Stewart[1] writes that both the "typical" American and the "typical" Oriental, if such persons can be found, are highly ethnocentric. Many Americans think that their national cultural characteristics are so extraordinary that all "foreigners" wish to become Americans or to adopt our customs. On the other hand, in their ethnocentricity, Orientals tend to think that their cultural character is so unique that it can't be adequately copied. Dean Barnlund[2] concluded the differences are so sharp across a wide set of attributes that these cultures are nearly exact opposites.

Robert Oliver[3] points to several basic differences in the approach by early Western and Eastern cultures. In the Western cultures, the purpose of discourse was to promote either the welfare of the speaker or the audience. In Eastern cultures, the purpose was to promote harmony. This difference caused Westerners to stress individuality leading to the belief of equality of anyone wishing to speak. The Eastern tradition sought a depersonalization with efforts to assure nothing in the message was original, but emanated from higher authority. It followed that opinion formation was the responsibility of the elderly or those in authority: Individuals had to earn the right to speak.

What is more directly concerned with participants observed behavior is that disclosure of personal feelings to a group is without a doubt, a behavior alligned with outgrowth of western culture and attitude. This behavior is considered inappropriate to eastern cultures and even gentle pressures towards this end is considered a rude invasion of privacy. To be subjected to this style of facilitation establishes an intrapersonal conflict in the form of a dilemma to acquiesce to the desires of the facilitators established as an authority figure or to maintain the cultural norm. Observable behavior resulting is a classic "checking out" and immediate drop to inclusion to examine values and in most cases, to decide to be "out" of the group, participation wise, as physically leaving would be rude and unacceptable.

In subsequent groups, composed in this intercultural manner, we have found it more functional to the group to provide a period of silence for introspection following disclosure by the facilitators of behaviors observed and the lecturette, rather that press for open group processing. To address early on the group, awareness of cultural differences and to make them OK appears to smooth the "checking out". Statements that the group should consider process observation of these different styles and be aware that work groups are not culturally alligned tends to facilitate understanding and conceptual awareness of intercultural group process and reduce member pressure to change behavior to pseudo-achieve group goals of openness and sharing. It further serves to demonstrate the difficulty to observe levels of group development without using acute communicaton skills in groups firmly embedded in pseudo-affection.

The concept and application of teamwork carries an atmosphere of the least amount of conflict and directiveness and lends itself to increased feelings of OKness, facilitating a state of pseudo-affection. The group ownership decreases individuality or depersonalizes the process. Communication is easily disguised by BOGSAT (Bunch of Guys Sitting Around Talking) and the term is approached by such a group to mean simple conversation. Both "Teamwork" and "Communication" are long standing supervisory roles and therefore not threatening on a personal level.

Conversely, Management of Conflict, Theory of Group Development and Personal Counseling are newer roles, not until recently considered applicable to managers. They closely revolve around willingness to see conflict and get personally involved. It further requires changes in styles which could be seen by subordinates as weakness in fulfilling traditional leadership roles.

For myself the lesson learned has been that facilitators attempting inter-cultural groups should be well versed in the cultural norms of the participants before attempting such an endeavor and be prepared to deal in different styles with the sub-groups. This provides an excellent opportunity to demonstrate different leadership and management styles required to recognize the differential needs in intercultural work groups. It further provides an opportunity to demonstrate that understanding of the opposite bases which can effectively function side by side if the managers and leader can appropriately use the systems perspective/social control and influence oriented/actor oriented styles described by Simons[4].

From a systems perspective, conflicts are to be prevented, resolved, or controlled: The emphasis is on similarities that unite individuals. From the perspective of those with an actor orientation; however, there are real, not just apparent differences of interest among men, each will defend his piece of the pie. So different can be the persuasion on issues that no resolution is possible except by total conversion to the other point of view. While such a solution may be perfect from one point of view, it becomes cultural imperialism to the other.

This has been for me a realization of the non-directive concept described by Coombs[5] that states the most effective style involves getting in the act with people. Social and work groups in most cases don't require change but bilateral understanding. Until this concept is utilized we will continue to face training failures with this group to parallel the failure of the Americanization of Kamehameha.

Theory and Practice

Consulting in Large Systems

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Introduction

The following paragraphs describe how the consulting process changes when it is performed in a large, complex (macro) organizational system. It changes because there are four major areas which are substantially different:

1) The organizational system itself is different

2) The top level executive client is appreciably different from mid-level managerial clients

3) The demands on the consultant are different and encourage a different kind of consulting style

4) The consultants' intervention strategies appropriate to large systems require an entirely different repertoire or kit bag of techniques.

Each of these categories will be discussed in some detail. Taken together they argue for a consulting style that is altogether different from the style appropriate at lower levels within an organizational structure, and often demand that some of the "basic" ground rules of consulting be violated.

The material presented has resulted from a series of intensive consulting efforts over the past year with large organizational systems within the U.S. Army. It has provided the opportunity to literally field test within a large federal system many of the concepts developed and tested in the private sector by Richard Beckhard, Warner Burke, Peter Vaill, Russel Ackoff, Noel Tichy, and others.

Over the past year much of the OD effort within the Army has shifted from addressing work group processes in smaller organizations to consulting within increasingly larger systems. The conclusions that are presented therefore are a direct result of experience in working for general officers charged with directing such organizations as the U.S. Army Command and General Staff College, U.S. Forces Command, Training and Doctrine Command, 1st U.S. Army, and Combat Development and Experimentation Command. Although these conclusions are tentative, nonetheless, our experiences have led us to observe a very different pattern in the consulting process. The differences can be described in terms of these four categories -- the system, the client, the consultants' style, and the intervention strategies.

THE SYSTEM

A large, complex system is almost by definition out of control. Certainly, it is beyond the ability of one person to effectively control. The late General Creighton Abrams, after assuming duties as Chief of Staff of the U.S. Army, remarked that he felt like a tugboat trying to make an appreciable change in the direction in which the Queen Mary (U.S. Army) was moving. All you can do is nudge it a little bit. This is no less true of the Army's major commands. They are classic marco systems.

Dick Beckhard[1] describes some of the reasons why these systems are so complex and why they appear to verge on the chaotic. Sub-elements of the system are involved in different tasks and often have different time perspectives and different senses of urgency. The sub-elements operate independently of one another. Multiple, simultaneous missions are being performed. The system itself is enmeshed in a very complex and diverse environment. Part of the complexity of the environment stems from the fact that the boundary between the system and its environment is very permeable. Many elements of the system interface with agencies in the external environment at multiple levels; the system itself is enmeshed in its own environment so intimately that it often becomes maddeningly difficult to determine precisely where the system leaves off and the environment begins. Because of the sheer size of the system, it is bound to include some sort of sophisticated technology with its accompanying contingent of guru's and experts.

The implications for managing or consulting in such a system are tremendous. There is very little structural clarity within the system. The "commander" is not really in charge of the total system. On the contrary, there are multiple, overlapping power structures entwined throughout the system. Decisions made at all levels have less impact than is normally recognized.

A specific example of a large, complex system might be in order. A consulting operation conducted for the Chief of Staff of the U.S. Army's Training and Doctrine Command demonstrates the complexity of such a large system. The command itself is, of course, responsible for hundreds of thousands of soldiers and scores of installations throughout the United States. The specific consulting task was to review the procedures that were used at the nine basic training installations that provide initial entry training to every soldier entering the U.S. Army. Although these nine installations comprise only a small portion of Training and Doctrine Command's responsibilities, it clearly demonstrates the complexities involved with managing or consulting in such a system.

Figure I provides a schematic of the system. The training centers, spread geographically throughout the U.S., reported to different general officers (either the commander or deputy commander) depending upon whether the center also had responsibility for doctrine development.

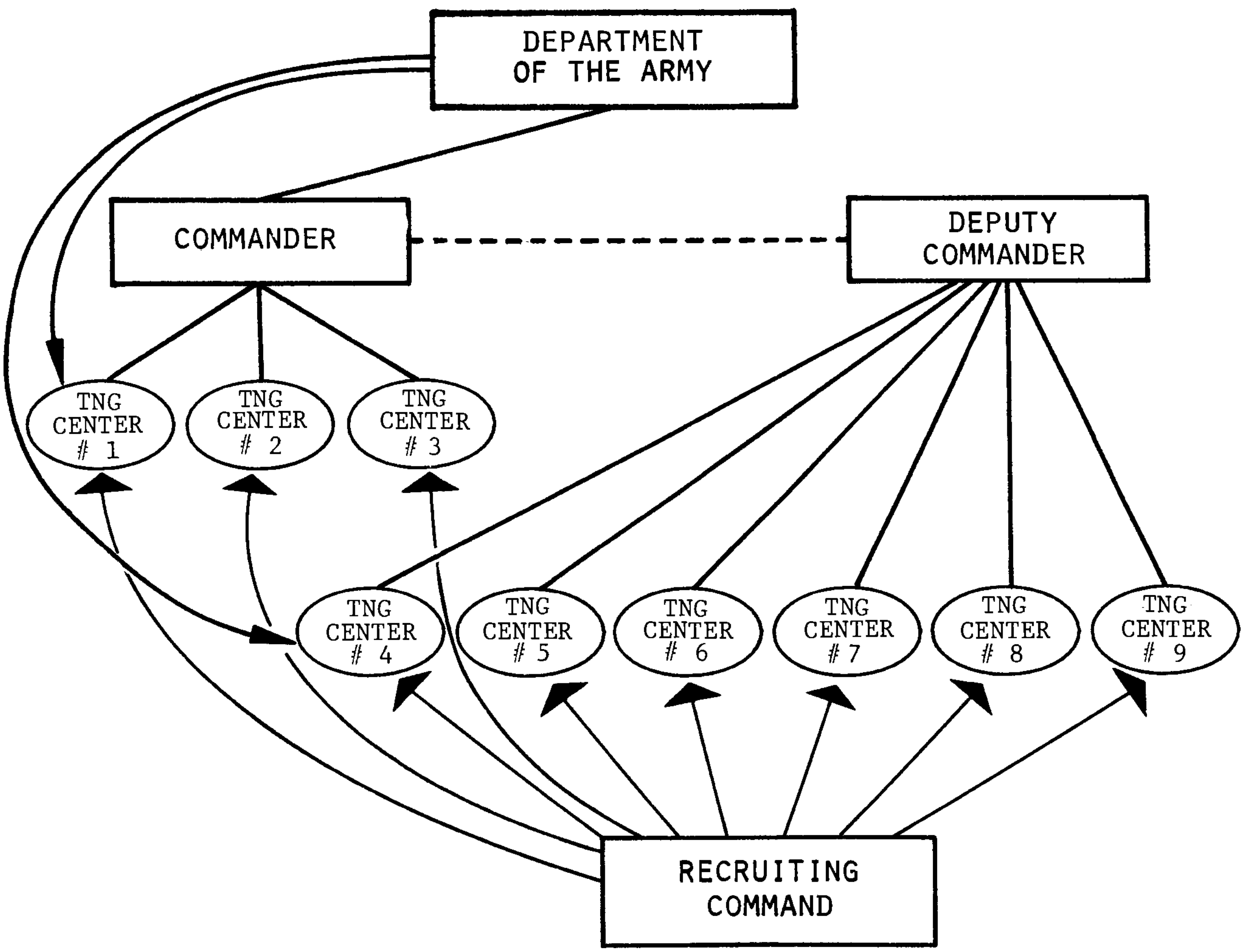


Figure 1

The commander and deputy commander were at entirely different installations. All centers, although operated in a very decentralized manner, were directly dependent upon Department of Army for assignment of training personnel and dependent upon the U.S. Army Recruiting Command (another complex, geographically diverse system) for the assignment of trainees to be trained. Some centers operated their own Drill Sergeant School while others did not. Training conducted varied from performing simple soldier skills to operating some of the most complex machinery to be found in modern warfare.

This is a large, complex, macro system like many others to be found in federal government and the civilian sector. There is nothing particularly "wrong" with them. They are just very large and complex and this size and complexity make them generically different from small, private business or an infantry battalion.

For a consultant in this large a system to conduct a thorough, data-based assessment of the entire system and then present this data to the client with the expectation that the client will reduce the data, extract trends and act on them is an unreal expectation. Although appropriate in smaller organizations, there are other more effective consulting styles. Before looking at them, however, it might be instructive to look at how the manager who operates at the top of one of these complex systems differs from mid-level managers. The consultant not only faces a generically different system, he faces a very different kind of client -- a chief executive officer or a general officer.

THE CLIENT

Both the literature and reports from consultants in the field agree that the client who sits astride one of these complex systems tends to be different from his mid-level managers. This would appear to be intuitively correct since it might well be that he is on top precisely because of these differences.

Henry Mintzberg[2] identifies a number of traits that managers of large systems have in common. They spend on the average no more than fifteen minutes on any particular issue and tend to make their decision from a gut level, intuitive (right brain) base, often in spite of thoroughly prepared, data-based, logical staff positions. They tend to focus on structured visible tasks with measureable results that require a short burst of activity and that appear urgent. There is normally little systematic planning on a long-range basis. Other observations include a tendency to avoid abstract conceptual thinking, in favor of hard concrete measurable issues. There is a tendency to rely on trusted advisors and a willingness to be confronted openly.

There are a number of explanations for why we find this kind of individual at the top of an organization. Clearly, his instincts are good. He has been rewarded in the past for good instincts and continues to use them. His career is certainly secure and therefore, he finds confrontation less threatening and, in fact, a refreshing change from safe-sided, meticulously prepared staff positions. Many have been successful because they have fully developed one special skill far beyond their contemporaries. It might be in the area of budgeting, or goal setting, or leadership, or selection of the correct lieutenants and trusted advisors. Whatever it is, it makes them very exceptional people ... at least in that particular area.

To the extent that this stereotype is reasonably accurate, it has tremendous implications for the consulting process.

As one moves up the hierarchial ladder of an organization, different managerial skills become necessary. The foreman/NCO/line manager generally needs to be able to administer the rules of the system provided to him in a fair and impartial way. The mid-level manager must mediate the demands of the organization and individual demands. His skill often revolves around rewriting the rules and regulations to keep them in line with the goals of the organization.

From the top level executive, however, is demanded an entirely different set of skills. These are broad and conceptual in nature. He must be able to change some of the goals of the organization, based on how he reads the organization's environment. The job demands that he spend a major portion of his time focusing on the external environment.

What can happen is that a mid- to upper-level manager is thrust into the position of a top level manager ... and continues to perform using the skills of a mid-level manager which may not always be appropriate for the higher level at which he is expected to operate.

The consultant in a large system, therefore, is faced with two phenomena which are quite different from what he has been accustomed to in smaller systems. The system itself, by its very nature, is chaotic and in some respects out of control. The client is normally very skilled and intuitive buy may or may not possess the conceptual frameworks that are demanded of the job. Even in cases where the skills are present, he is relatively powerless to institute major changes throughout the entire system. This calls for an appreciably different consultant style than what might be appropriate in a smaller system, and it is this style which will be addressed in the following section.

THE CONSULTANT'S STYLE

Briefly stated, the consultant to such a client in such a system must operate from an expert base with clearly articulated, value-based diagnostic models. What assessment data is collected (often using para professional teams) is collected so that the consultant can come to his own expert conclusions about the relative health of the system. The data is not collected to be fed back to the client.

These issues will be elaborated upon in the following paragraphs. The style of the consultant is largely driven by the fact that in a large system the client is not the commander but the system. This is a very important distinction and flies in the face of some very basic rules around consulting within military organizations. It has been a basic tenet of consulting in the Army that the client is the commander because any other arrangement would weaken the chain of command in an organization that literally depends for its livelihood on effective control.

In a small military system such as a battalion, the commander is clearly in charge and can cause change to happen by sheer force of his own will. In a large military system such as a major command, as shocking as it may sound, no one is really in charge. As counterintuitive as it may sound, the man with four stars has far less control over his organization than does the field grade officer in charge of a battalion. Change agents must locate and activate sources of power within organizations since this is the key to change. In a small system the commander is the principal source of power and therefore, becomes the client. In a large system there are multiple sources of power and overlapping power structures. Therefore, the focus is on these sources of power - not the commander.

A small system can implement lasting change effectively within a few months. A large system takes three to five years to change. The military commander in a large system is just temporary hire in that the change process is likely to require more than his tenure to complete. The client is the organizational system itself. With this distinction in mind, it would be helpful to review in greater detail some of the more important elements of a consultant's style.

On the continuum from expert to process consultant, the large system consultant is far more effective as an expert consultant. He is dealing with general officer/chief executive officers who are accustomed to hard, sound recommendations. They are quicker to treat you as an expert and fully expect expert advice. Credentials are not as important. At the higher levels you are innocent until proven guilty. The consultant does not ask the client "how he feels about that" but provides sound, well-reasoned advice about organizational processes ... not interpersonal processes.

It is legitimate for a consultant to advise a client that responsibilities are not clearly defined and tasks are not prioritized and to recommend that he use responsibility charting to solve it. That is expert advice. The commander does not have the time to be led through an open-ended thought process so that he "owns" the solution. He does not have to own it, since first of all he is really not that influential throughout the whole system anyway, and the consultant's focus should be on the organizational system and ways to improve it.

It is legitimate for a consultant to take charge of a high-level open systems strategic planning session and be quite active in facilitating and changing the design, based on his own judgment of where the group needs to go. Once again, it is unimportant for the top level to "own" the design and actively participate in every step. If they did not want to do long-range planning, they would not be there. You, as the consultant, are the expert on the design and are expected to act that way.

The large system consultant should have a very clear idea in his own head of what a healthy system should look like. He enters the system as an expert and knows what he is looking for. There is a client (the system) and a doctor (the consultant). A doctor does not muddle through a body to "try to make sense" out of what he finds. He has very clear prescriptive criteria for what makes for a healthy person and checks the person against that criteria -- heartbeat, pulse, blood pressure, temperature, etc.

There are many diagnostic models that a consultant can use. Don't use two or three. Eclecticism is inappropriate. A consultant should use one clear model with which he is comfortable and the model must be prescriptive, not descriptive. It should evaluate a system against set criteria and not simply describe a system. Figure 2 illustrates such a model. Many of the questions were developed by Harry Levinson[3] and Peter Vaill[4]. The categories themselves are my own. In simplest terms, as I look at a large system, I check it out to determine how well it meets my criteria for health. Is the environmnet being scanned? Are goals clear and prioritized? Are assets allocated in terms of priorities? Are reward systems rewarding goal accomplishment? Is power and authority delegated to the correct level? How well does information flow up/down/laterally? The particular questions that you ask are not as important as your knowing precisely what you are looking for. The diagnostic model essentially permits you to act as an expert consultant.

(See next page for Figure 2)

Figure 2

ORGANIZATIONAL DIAGNOSIS

The following questions, grouped by key organizational functions, offer one method for analyzing the health of a large organization.

1. ENVIRONMENT
   - Is the environment scanned for threats or opportunities?
   - What external factors have the greatest impact on internal operations?

2. GOALS
   - What is the core mission?
   - Are there long and short range goals?
   - Are they prioritized and reviewed?
   - If you had to judge strictly by people's behavior, what would you say the mission of this organization is?

3. STRUCTURE
   - Are assets allocated to priority goals?

4. INDIVIDUALS
   - Are people rewarded for organizational goal accomplishment?
   - What are people rewarded for?
   - What do people want?
   - How do you find out how you are doing?
   - Is there a match between individual and organizational goals?

5. POWER
   - Are decisions delegated to where both competency and information exist?
   - What are the crucial decisions made at each level of management?
   - Are responsibilities well defined?
   - Who has the power? (Movers and shakers)
   - Who do you go to to get things done?
   - What are the main rules everyone has to follow?
   - Is conflict management avoided?

6. COMMUNICATION
   - How well does information flow? Down? Up? Laterally?
   - What feedback mechanisms are used to check implementation of decisions?
   - How do people find out what is going on?

7. GENERAL QUESTIONS
   - What do you like/dislike about your job?
   - What gets in the way of doing your job better?
   - If you were in charge, what would you change?
   - How are decisions made?
   - What does your boss need to know that he doesn't know?
   - What do people need to do more of less of? How should they change?
   - What will be the reaction of people to this information?
   - What question should I have asked you that I didn't?
   - To what extent is this organization a high performing system?
   - What does a typical day look like?
   - If this organization were a person, describe it to me.

Data gathering techniques in large systems are conducted differently and used for a different purpose. The sheer size of a large system discourages a thorough, detailed assessment even with help. In the Training and Doctrine Command effort mentioned previously, survey printouts and interview notes were obtained from all nine training centers across the country. Although the information was certainly useful, it was not cost effective in terms of the effort involved.

Once again, the consultant in a large system must operate from an expert base of power, not simply from information gathered through an assessment. To be sure, interviewing of key people and groups at selected points throughout the system is important; however, it is important so that the consultant can arrive at his own conclusions concerning the health of the organization, using his diagnostic model, and can then offer expert advice. The assessment data is for the consultant's use, not for direct feedback to the client.

Individuals in a smaller system can normally identify what the problems are and frequently can suggest excellent solutions. The consultant in a smaller system can often get away with simply orchestrating data: collecting it from people, presenting it to the commander, and helping him to do whatever it is that he decides to do. In a large system people tend not to be able to offer solutions because the issues are not interpersonal nor group process issues -- they are sociological, organizational process issues which most people are not trained to see. In the larger system, therefore, the consultant must take responsibility for giving expert advice based on the way his own assessment has allowed him to diagnose the organization.

Another difference is in the use of consulting teams and para professionals. To accurately sense a large organization requires the help of other consultants or para professionals...those who have some skills in interviewing and/or group facilitation. In addition to using multiple consultants during the diagnostic phase, an extra number of consultants is always helpful during times when the top team assembles for action planning conferences and similar activities. The lead consultant takes responsibility for managing the process and, in fact, does this through a team of management consultants. The large system consultant should fully expect to be involved in managing the efforts of a consulting team.

The final major difference in consulting style at this level evidences itself in the action or implementing stage when diagnosis is complete and action is called for. The problems, issues, and perhaps even solutions have been identified and now sources of power must be located in order for the change to occur. In a small system this is not as crucial a step since the real source of power is the client. In a large system, since it is out of control in many ways to begin with, it becomes paramount to locate those bases of power and power structures that have to be located in order to cause the change to occur. Some of the kit bag techniques discussed in the next section are, in fact, political mapping techniques which permit the consultant to locate and tap into these very crucial sources of power in the change effort.

KIT BAG TECHNIQUES

Just as there are designs such as team building, process consultation, and interpersonal communication which are appropriate "kit bag" techniques for operating in small systems, there are designs and techniques appropriate for large systems. This section will describe only a few of these techniques. They are not original, but come from other authors. These particular ones are included because we have had some experience with them and have found them useful. In almost every instance, they are diagnostic models which help us to better map and operate within a large system. Ackoff's expanding system, Beckhard's political mapping system, Deluca's power analysis, Beckhard's transition management and one open systems planning design will be discussed in terms of some recent experience in using the models. This is, of course, not a very complete kit bag but does provide the consultant with some sense of some of the tools which might be appropriate at this level.

Russel Ackoff's[5] approach to diagnosing large systems is both simple and powerful. He suggests that when problems develop in one element of a system, look to higher echelons in the system for its cause. If you are having problems with the carburetor, do not take apart the elements of the carburetor (analysis) but look to the larger system (synthesis). The problem may well be in the fuel line, or in the fuel from a certain gas station. Our typically western habit is to break down elements of the problem into bite sized pieces when often, we should be addressing how the elements under scrutiny mesh with the other elements in the environment.

At one point I was asked by the commander of an Army training brigade to analyze the interface between drill sergeants and trainees. Being able to "take apart" only the internal pieces of that brigade, I was never able to fully locate the source of the difficulties. Almost two years to the day, I was directed by the Chief of Staff of Training and Doctrine Command to address the same issue as it affected all nine training centers. By addressing the issue at this level, solutions became apparent since the charter allowed me to address such issues as the interface with recruting command, the training of drill sergeants, etc. The solutions often lie in the larger environmental systems above where the problem first evidences itself.

Ackoff recommends therefore, that you 1) identify the whole of which your object is a part, 2) explain the behavior of the whole and then, 3) explain the role of the object in how it functions in the whole.

A corollary to his theory is that if all parts of the system are operating at optimal efficiency, then the whole system is not working well. If you take the best carburetor in the world and the best ignition system, combine them with the best electrical system, etc., you will not arrive at the best automobile. In fact, you will have no automobile at all but a bunch of pieces. Each sub-element of the system must sub-optimize in order for the entire system to operate at peak efficiency. In military units you cannot put almost all your assets (time, money, people) into training if maintenance suffers too heavily. Each system must be sub-optimized if the entire system is to perform at optimum capacity.

Once the locus for change has been identified, then political mapping becomes very important. Beckhard and Deluca offer two mapping techniques that have been slightly modified in practice and have proven very useful in permitting the change agent to focus on the target group for change and also, identifying the group that will assist in causing the change to happen.

Beckhard[6] suggests that you identify groups in the system that have power and then categorize them into those groups that will make the change occur, help the change occur, let the change occur, or resist the change. This describes their existing predisposition toward change. You then describe what you would like their predisposition to be. This identifies how much change each group will be required to make. The next step is to identify the forces that can be brought to bear on each of these groups. Finally, target groups are prioritized and the change effort is begun.

Beckhard's description of this process is, of course, far more elaborate and complete. However, an example of its application may help to demonstrate how useable this concept is within a large system. Figure 3 describes the Training and Doctrine Command operation in terms of Beckhard's model.

Figure 3

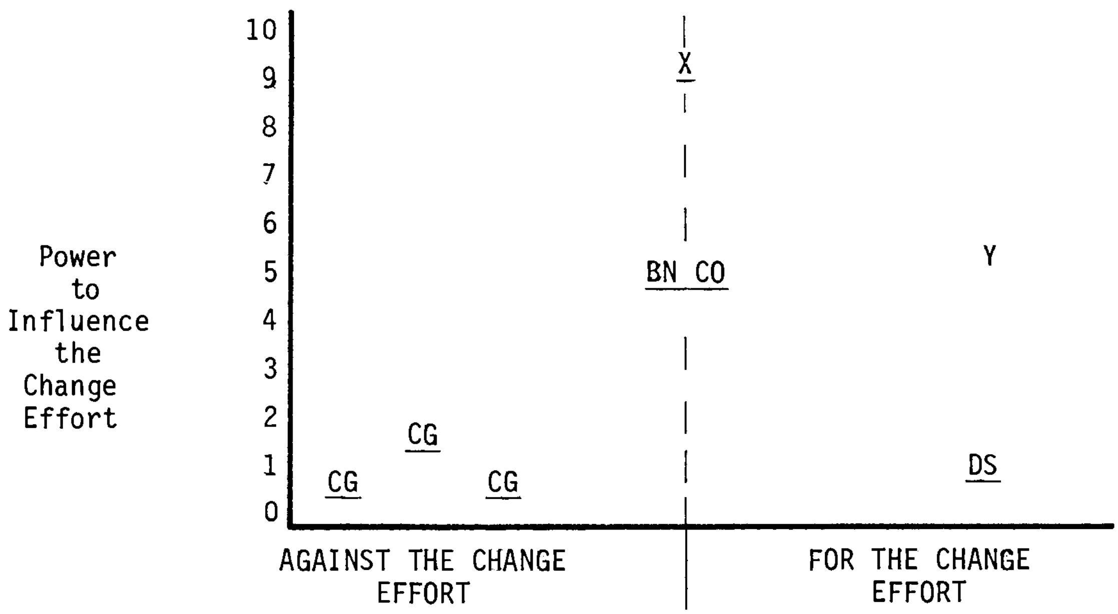
POWER GROUPS	PREDISPOSITION TO THE CHANGE EFFORT				FORCES TO WHICH THEY WILL RESPOND	PRIORITY
	Resist	Let	Help	Make		
OLD DRILL SERGEANTS		X		Y	BOTTOM UP EVALUATION SYSTEM	1
NEW DRILL SERGEANTS				XY	DRILL SERGEANT SCHOOL	
DRILL SERGEANT SCHOOL				XY	INSTALLATION COMMANDERS	
OFFICERS		X	Y		BOTTOM UP EVALUATION SYSTEM	2
DEPARTMENT OF ARMY STAFF		XY				

X = As it is now
Y = As we would like it to be

Very simply, his model permitted us to identify the major power groups within the system and to identify which of these groups would require the greatest change effort. It was reasoned that the old, existing drill sergeants in the system presented a formidable power base that required the greatest amount of change if the change effort was to be successful. The mapping technique proved very useful in identifying the focus for the change effort.

Deluca has developed a smiliar technique which not only identifies groups that will resist change, but plots their relative amount of power and provides a visual presentation of how these groups network with one another. Data from this same case study was plotted on Deluca's graph in Figure 4 and can be interpreted as follows:

Figure 4



CO = Installation Commanding General

BN CO = Most Battalion Commanders

DS = New Drill Sergeants

X = Influential Officer in Headquarters

Y = Staff Section in Headquarters Charged with The Change Effort

The vertical placement on the chart indicates the total amount of power that these groups/individuals possess. The higher their position, the more powerful they are. The groups are located along the horizontal axis in terms of total support for the change effort with support increasing from left to right. This provides a visual plot of all the power groups and their disposition toward change. The task of the consultant is, therefore, to identify those groups/individuals who are both powerful and vulnerable to being moved further to the right. It provides simply another way to map the political structure of an organization.

Once the source of the problem has been located and a change strategy has been developed, the consultant must insure that a transition management team from the organization takes responsibility for managing the change process. This is Beckhard's concept and is absolutely essential for effective change in a large system. Once again, like so many other powerful concepts, it is deceptively simple. Change in a large system takes three to five years to complete. Whereas, in a small system the client can direct that a change occur and personally monitor the process, the changes that occur in a large system are complex and cause other complex changes to occur. Many of these cannot be predicted.

The purpose of the transition management team is quite simply to <u>manage</u> the change process. This means planning, coordinating, monitoring, adjusting, reclarifying and replanning the change process over the two to three years that the changes occur. Beckhard offers a variety of options in staffing the transition management team. The important issue, however, is that someone or some group be specifically charged with that function.

This is often resisted in our experience since it implies some structural change which causes people to interact with one another in new ways. Despite this resistance, it is a provision that a consultant cannot ignore and is peculiar to large system change.

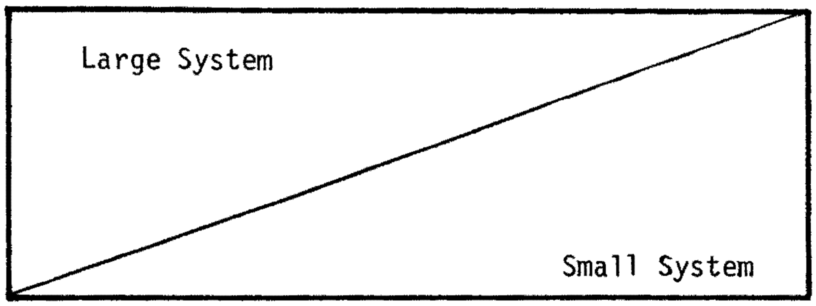
Open systems planning is the last kit bag type of an issue to be addressed. It is particularly appropriate for the large systems consultant since much of the top team's time should be devoted to addressing the interface between the system and its environment. There are many excellent designs for open systems planning. Our experience has been, however, that regardless of the design, at least two days must be allocated. There are two major facilitation considerations that the consulting team must address. It must first of all be actively and aggressively facilitated by the consultants since the design is normally quite complex. Secondly, there must be an equal amount of integration as there is differentiation. If the design runs for two days, the first day can, and should be, very abstract and conceptual material in such a format for the following day that the participants can in fact perform some very concrete planning steps.

In our experience with the U.S. Army Forces Command and 1st U.S. Army, the open system planning design proved very useful in both setting long-range directions for major commands and encouraging managers throughout the system to think in conceptual terms.

CONCLUSION

A final word of caution is in order. The large system described and the client who manages that system represent extreme cases. The concept of large system versus small systems should be considered on a continuum (see Figure 5).

Figure 5



The consulting style used and the techniques applied will often include a mix of large system and small system procedures. Clearly, team building is more appropriate in a small system and political mapping more appropriate in a large system. There are always, however, many shades of gray where combinations of techniques are appropriate.

It is safe to say that the demands on a consultant who operates in a large system are generically different from those found in a smaller system and that the techniques effective in one differ considerably from those employed in the other.

FOOTNOTES

1. Beckhard, Richard, et al., Explorations on the Teaching and Learning of the Managing of Large System Change, Unpublished Manuscript.

2. Mintzberg, Henry, The Nature of Managerial Work, Harper and Rowe, 1973.

3. Levinson, Harry, Organizational Diagnosis, Howard University Press, 1972.

4. Vaill, Peter, Unpublished Seminar Notes, Army War College, 1979.

5. Ackoff, Russel L., Redesigning the Future, John Wiley & Sons, 1974.

6. Beckhard, Richard, Organizational Transitions, Addison Wesley, 1977.

7. Deluca, Joel R., Developing Strategies for Dealing with the Socio Political Content of Planned Change Efforts, a Paper presented at the OD Network Conference, Fall 1979.

Hopping Onto A Moving Train: A Macro System Intervention

CPT Randy Duke
Dr.Jerry Eppler
MAJ Joe Riley
Mr. George Long

Since October 1978, several OESOs have been involved in a major macro systems intervention at LOGCEN, Ft. Lee, VA. Although the operation is not yet completed, there have been many significant learnings concerning large systems change that we will discuss in this article. First, we'll review the background/sequence of activities of the operation. Next, we'll discuss a macro systems change model developed during the operation, and finally cover our insights/lessons learned to date.

BACKGROUND

The LOGCEN operation began in October 1978 with an initial assessment conducted for the General grade client by MAJ Joe Riley. A number of problem areas surfaced in the assessment were selected for staff corrective action. In July 1979, an organizational resurvey was conducted to determine if significant improvement had resulted from standard chain of command actions. The results of this resurvey indicated that the problems identified in October 1978 were of such a nature (horizontal) that traditional chain of command actions were ineffective in bringing about the desired organizational changes. (Horizontal issues are those issues common to all directorates or sub-components of the formal structure).

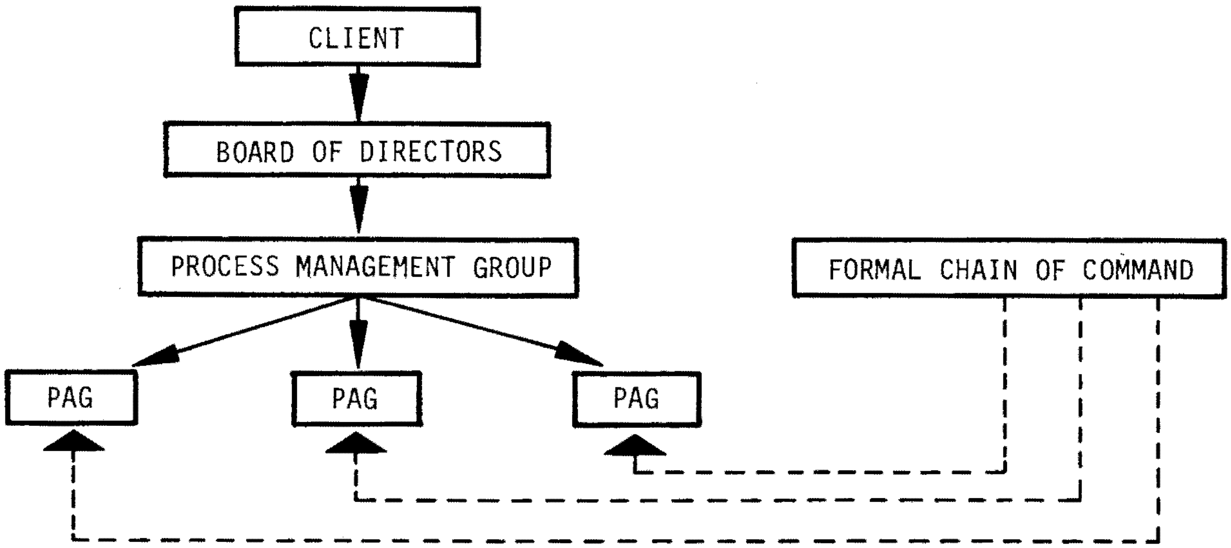
At this point, the client decided to begin a major OE change process -- using OE technology/personnel to provide conculting assistance. In August 1979, interviews were conducted with the top team (0-6s/GS-14s) in order to begin inclusion of the top team in the change process and to assess their understanding of the problem. In September 1979, the client committed himself to 1) activate the change process plan developed by MAJ Joe Riley and Dr. Jerry Eppler, 2) allocate the necessary resources and, 3) request external consulting assistance. LTC JIM Looram, Mr. Bob Goodfellow and CPT Randy Duke from OECS were added to the consulting team. Dr. Glenda Nagomi, ARI, also joined the operation to provide evaluation data on the intervention. A three-day planning/teambuilding session was conducted in in October 1979 for the top team. Major outcomes from this session were increased top team cohesion, the establishment of the top team as a Board of Directors, commitment by the top team as a Board of Directors, commitment by the top team to the change effort and increased problem(s) clarity. In November 1979, LTC Frank Burns, DA OE Consulting Cell, conducted a performance management conference resulting in increased clarity by the Board of Directors concerning organizational mission, objectives and priorities.

Management style workshops were conducted by Bob Goodfellow in November 1979 for mid-managers. The two outcomes of these workshops were increased management style awareness for the mid-managers and the initial involvement of the next lower organizational echelon in the operation.

In December 1979, Michael Doyle of Interaction Associates, Inc., joined the consulting team. With his assistance, another three-day Board of Directors' planning session was conducted. At this point, the Board of Directors developed the final draft of the problem-solving process, and increased their own process management skills. Immediately following this session, Mike Doyle conducted a six-day facilitation training program for LOGCEN personnel selected to facilitate organizational problem-analysis groups established by the process plan. These problem-analysis groups (PAG's) first met during January 1980.

PROBLEM ANALYSIS GROUPS

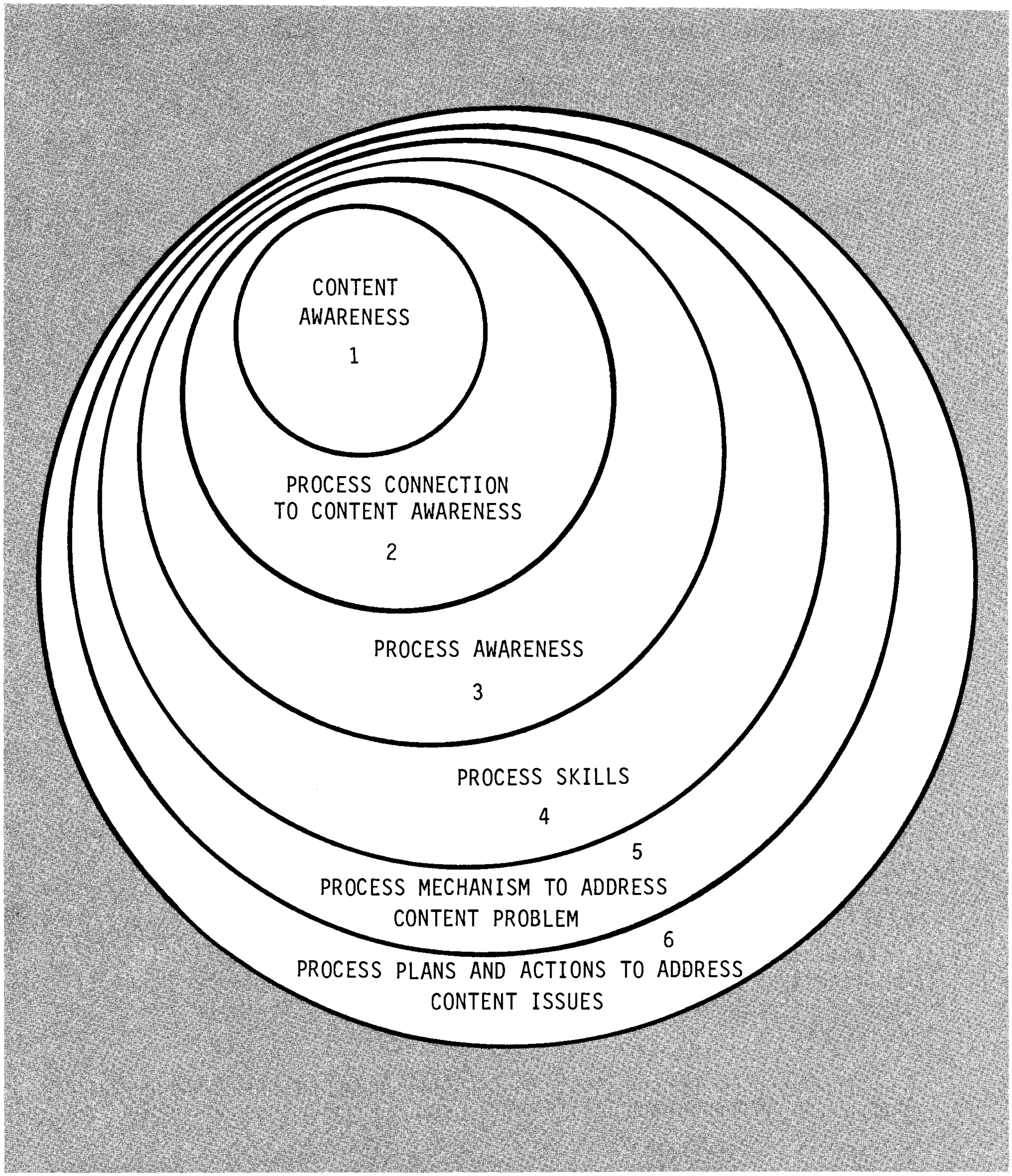
The change process proposed by the OESOs, modified and adopted by the client and Board of Directors rested on a foundation of problem analysis groups. These groups are composed of organizational personnel conerned with the specific problems identified by the assessment data. They propose recommended policy changes needed to alleviate the problem. Each group is an ad hoc committee, facilitated by a trained internal peer and chartered by the top team to represent horizontal slices of the organization. Additionally, these members are expected to represent the organizational informal power structure. Thes PAG's are directly responsible to a Process Management Group (PMG) headed by the local OESO. The PMG is responsible to the Board of Directors and they to the client. (The concept is similar to the Quality of Work Life collateral organization developed by General Motors). This intervention strategy is diagrammed as:



The PAG's recommend action to the PMG's/Board of Directors and provide an information link to/from the formal structure. (A copy of the Board of Directors' Charter and the PAG concept document may be obtained by writing CPT Duke).

"A BETTER MOUSETRAP"

The macro systems model developed and implemented during this operation contains two major components. As already discussed, it increases the degree of input/power of lower organizational echelons in solving horizontal problems. Second, organizational members are educated in the concept of process and become increasingly proactive in designing their own organizational processes. A model to illustrate this concept is:


CONTENT
AWARENESS
1
PROCESS CONNECTION
TO CONTENT AWARENESS
2
PROCESS AWARENESS
3
PROCESS SKILLS
4
5
PROCESS MECHANISM TO ADDRESS
CONTENT PROBLEM
6
PROCESS PLANS AND ACTIONS TO ADDRESS
CONTENT ISSUES

DEFINITIONS

1. Content awareness

   Assessment data generates organizational issues/perceptions

2. Process connection to content

   Consultant feedback strategies to client and client system (key players). K&R model, ISR model, etc.

3. Process awareness

   Consultant develops process perception with client and key players (planning workshops, training on processes)

4. Process skill building

   Consultant facilitates client and key players in recognition of process issues around content symptoms

5. Process mechanism design and management

   Consultant assists client and key players in designing process mechanisms and procedures to manage them

6. Process action to address content issues

   Client and key players actuate problem solving mechanisms to address content issues. Client and key players monitor progress and allocate resources.

This model addresses the steps in the LOGCEN consulting process, beginning with identifying original content "pain," moving through process awareness and finally, to resolution of content "pain" through a new organizational mechanism. The key to this macro system intervention is that the key organizational leaders now plan the process to solve the problem rather than going directly from identifying the problem to problem-solving by themselves.

Another way to describe this approach is that the client realizes that he cannot solve the problem(s) directly -- so, he develops a process for others in the organization to solve the problem(s).

In order for this process to be effective, the following must occur in the realm indicated:

REALM	ACTIVITY
1 & 2	Commitment on part of client
2 & 3	Commitment expanded by key players
4,5,6	Commitment expanded to entire organization

REALM	ACTIVITY
1 & 2	Training one on one with client
2 & 3	Training expanded to key players
4,5,6	Training expanded to entire organization

(All training must be task/content problem related for top management stages 1, 2,3)

Training = interpersonal and process skills

1-3 Internal consulting commitment only
4-6 External consulting commitment needed

As each step is taken in the model, organizational members become more aware and effective in dealing with content issues. In addition, the processes the organization develops to handle these "non-traditional" issues may then be applied later to any such problem, without having to design an entirely new organizational problem-solving process.

MACRO SYSTEM INTERVENTION INSIGHTS

A number os insights/learnings have resulted from this macro system intervention. They include:

a. Macro system change takes time. Managing the impatience of the client, the organizational members, internal and external consultants is difficult. Most of these individuals think in terms of short term interventions/successes. This operation will have been over one year old before the first APG addresses the first content issue. Thus, the flow of interventions is planned and published months in advance.

b. The OESO is constantly focusing and refocusing the organizational data while simultaneously developing the planning mechanism to address the "fuzzy" problem statements.

c. A macro systems approach is a total organizational approach intervening at all levels and focusing on building bridges between vertical and horizontal elements in the organization.

d. The OESO concerns him/herself with organizational process issues/planning rather than content problems.

e. The OESO spends the majority of time (70%) re-examing the problem issues from a horizontal rather than vertical perspective.

f. A macro systems effort must be viewed as an organizational commitment to long term change usually projecting two to five years into the future.

g. The client has to be at the top of the organization.

h. The client has to have the opportunity to address content problems in a traditional manner, resulting in an inability to solve the problems. This creates the awareness that there is an organizational process problem.

i. Once the client is aware of process problems, the other key players must be aware of the process problems.

j. Interpersonal skill training becomes a necessity for key personnel to deal effectively with each other and the ambiguity characteristic of process problems.

k. Content problems are the catalysts enticing participants to address the process (results in dethreatening).

l. There is little knowledge on how to market such an operation in order to obtain commitment for and from external consulting assistance.

m. Open ended contract with client must be established to legitimize planning changes.

n. Micro system interventions can be used for macro systems outcomes. (See Incl).

o. Macro system interventions cannot be mandated at OECS. This is because of client commitment, consultant resources, consultant's confidence in his ability to manage the entire process, client's time and capability to transfer skills to organization.

p. Client moves faster than the top team; client's frustration needs to be managed by consultant.

q. As events come quicker, the resources required are of larger magnitude. As momentum increases, anxiety, stress increase. The consultant needs to build in coping strategies.

r. Establishment of organizational problem analysis groups to propose changes in unit functioning constitutes a "de facto" alteration in the organizational structure. Legitimizing the informal power structure may also occur, depending on the criteria for membership and power vested in the problem analysis groups by the senior managers.

s. A viable reward system for being a problem analysis group facilitator and/or member must be established. It will probably be most effective when selected by the recipients.

t. Problem analysis groups need an early "success" with the proposed action being favorably considered by the senior managers. This "success" does not have to involve a major issue; in fact, it would likely enhance productivity for it to be a moderately important/short-term, easily executed solution.

SUMMARY

Although this article does not detail specific workshop interventions, the entire theory/flow of the macro system intervention has been described. Basic workshop designs (i.e., process training, performance management, teambuilding, facilitator training, etc.) are the major building blocks of the intervention and they are tied together sequentially in order to move the client system progressively through the long-term change effort. Between major workshop interventions, the lead consultant maintains contact with the client, advising him of all consulting activities, and continues planning subsequent activities in conjunction with external consultant resources.

When the results of the PAG's activities are reviewed, we will publish any additional lesson learned concerning macro systems change at the LOGCEN, Ft. Lee, Virginia.

A COMPARISON OF MACRO/MICRO SYSTEMS CHARACTERISTICS

MACRO CHARACTERISTICS	MICRO CHARACTERISITCS
Top team develops process problem solving mechanism (PAGs).	Top team develops content pro-lem solving mechanism (staff study; action planning workshop)
Organization spends 70% of time defining and validating problem (progressive; if you don't agree on the problem, you won't agree on the solution).	Organization spends 70% of time solving problems (traditional; come to fast solution but organization sees that as solution to wrong problem; no consensus as to the definition of the problem).
Constant focusing on process issues contained in content assessment data.	Constant focusing on content issues contained in assessment data (top team directed that the staff notes be disseminated after the meeting).
Developing mechanism to define fuzzy problems (perception/validation/consensus seeking on problem definition) (joint action management process which is composed of Board of Directors, problem analysis groups, process management group, facilitator service - their task is to have the organization define the problems).	Developing mechanism to deal with defined problems (taking action, i.e., problem solving).
Developing mechanism to work at multi organizational levels. High degree of process orientation. Problem solving team drawn organization wide.	Mechanisms at one organization level - vertical. Client centered problem solving, i.e., staff, one section - intact works (team), the commander
Long term (2-5 years).	Short term (6 weeks - 12 months).
Systemic view of problems (process of management practices)	Symptomatic view of problems (GOQ items).
Address organizational concerns using process awareness skills (plan to plan) (planning to do - when Board of Directors actually tasks a PAG) (planning to plan to do - developing the PAG concept; planning to plan the PAG concept, i.e., develop strawman).	Address organizational concerns using content oriented skills (doing problem solving).

MACRO CHARACTERISTICS	MICRO CHARACTERISTICS
An approach which is multi-level in organization (the command structure has developed a system to involve the entire organization in the problem definition and solution; everybody who is a party to the solution (problems specific).	An approach at one or two levels in organization (the problem is defined and solutions recommended within one or two levels of the organization) (solutions specific)
An approach which builds bridges between horizontal organization elements (problems affecting the majority of the organization).	An approach which builds bridges between vertical organization elements (chain of command).

Battalion Reenlistment Workshop

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Retention of First Termers and Careerists in the Army is OE business. A synopsis of an OE operation that successfully tackled this issue follows: In October and November of 1979 we were invited to work in a battalion whose reenlistment figures were falling far short of the assigned Division goals. Prior to this request we had conducted a transition in the battalion and discovered data that pointed to much deeper problems than those normally associated with reenlistment. The battalion commander requested us to begin a systematic analysis of issues within the battalion which had a debilitating effect on reenlistment. Through research, interviews, and group sensing sessions we surfaced issues that could be dealt with to improve the battalion reenlistment environment. These data were fed back to the commander and a workshop was designed and implemented to increase reenlistments. The battalion reenlistment goals for the month of December were exceeded by about 300%. Enough soldiers enlisted in December to make up for the October and November shortfall. Recent follow-up with this battalion indicated that they are still exceeding the Division reenlistment goals and the commander indicated to us that "similar success has been predicted for future months." The bottom line is - we have developed a method of applying the OE process to the critical task of retaining quality soldiers in the ranks of today's Army.[1] This process will be discussed in the following sequence: THE SITUATION, OE TECHNOLOGY, OUTCOMES, and ASSESSMENT OF ORGANIZATIONAL COST.

THE SITUATION

The battalion had recently undergone a change in command of both the battalion commander and the CSM. After the transition meeting, we contracted with the battalion commander to look into

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[1] *The reenlistment workshop has been conducted in various settings with equally successful results. For purposes of illustrating the mechanics of the workshop, our comments will be restricted to the first instance in which we implemented the design.*

the reenlistment situation. In order to accomplish this task we conducted individual interviews and group sensing sessions. These techniques for data collection will be discussed in the section entitled, "OE TECHNOLOGY," later in the paper.

Key factors in the battalion reenlistment environment are summarized below. In an attempt to illustrate how these elements were integrated into the planning and workshop design, we have included a brief discussion of workshop implications after each factor.

Overcentralization: "Brigade runs everything."

Overcentralization of authority at Division level (e.g., the battalion commander was not permitted to select his own company commanders and discovered that he actually had more authority when he was a company commander than in his present status as battalion commander) left the battalion little flexibility to carry out its mission. It prevented the battalion from responding quickly to brigade and Division demands. The atmosphere within the battalion was one of fear. This extended down to the lowest levels within the battalion. Company commanders were afraid to take the risk of delegating work to their NCOs and this resulted in the overtasking of a limited number of officer resources.

Implications:

Inability to delegate created an environment in which company commanders and NCOs were not cooperating with one another. Our design needed to create a vehicle which would facilitate communication around the issue of reenlistment. It was our feeling that if they began talking about reenlistment, they might begin communicating and using the chain-of-command in other areas as well.

The design also needed to include a statement of the commander's philosophy toward centralization to create an awareness, particularly in himself, of how he was modeling overcentralization.

The Line versus the Staff: "We live and breathe crisis management in the battalion."

The typical line-staff conflict situation existed in the battalion. The battalion staff resorted to responding to all requests from brigade and Division. As one interviewee stated, "Everything is red hot and short-fused." In essence, the battalion was trying to do everything at the same time (i. e., juggle the balls but don't drop the glass ones) with inadequately distributed resources.

Implications:

The staff operated on "assumptions" of how the companies functioned; they often did not have time to obtain company input on critical issues. We realized that the reenlistment workshop needed some type of "coordination" activity to work these issues out. The spinoff effects of such an activity would be to break down assumptions and misconceptions each had of the other (i.e., the line versus the staff) and to facilitate collaboration. Finally, this activity would provide a forum for the battalion to work out pressing issues affecting the organization as a whole. Some resolved issues would be implemented immediately upon the closing of the session.

Perceived Images of Enlisted and Officers in the Battalion: "NCOs are no longer the backbone of the Army."

Division and brigade levels had such a low opinion of the capability of soldiers in the ranks that the attitude developed "that officers are now the backbone of the Army." The poor attitude was backed up by interfering actions such as leaders from Division and brigade going so far as to relieve NCOs conducting PT activities of the enlisted personnel.

The extent of (and kind of) interference created a low morale among the enlisteds and destroyed trust between officers and enlisteds. Communication between these two groups virtually ceased and each group had a set of disrespectful epithets for each other.

Implications:

Data indicated that the workshop needed to create an atmosphere in which these issues could be resolved. At the time of our data collection, morale was extremely low among the enlisteds as well as between officer and enlisted ranks. Trust was practically non-existent due to the distorted perception each had for the other. Each group reacted to the other as if their perceptions were fact.

In addition to a need for clearing the air, we realized that the workshop must have some format for responsibility charting. This was important for two reasons. First, many traditional reenlistment functions (e.g., the progression roster, bars to reenlistment, etc.) were not being kept up to date due to a lack of clarity around reenlistment responsibilities. Second, the battalion reenlistment NCO was the sole person engaged in any reenlistment effort during the time we were assessing the battalion. Enlisteds considered the company reenlistment NCOs to be unhelpful and did not respect them as soldiers.

Negative Peer Influence: "Nobody would reenlist for this place."

It became the norm for enlisted persons to be looked down upon by their peers if they indicated they were thinking of reenlisting. This negative peer influence had its source in groups of soldiers who had decided to leave the Army. These individuals felt "let down" by the Army. They had bought into the ads and media which suggested that an individual come into the Army for a one or two year period and leave with a number of benefits. However, they had not received all that had been promised (e.g., skills, educational benefits). When the battalion did nothing to help transition them into civilian life, they returned to the barracks only to sabotage (through their negativism) those soldiers who were "on the fence" and had not decided whether or not to reenlist, giving them a bleak picture of how the battalion (and hence, the Army) operates.

Implications:

Consequently, the workshop needed a mechanism to deal with those transitioning into civilian life and hence, a means of dealing with the negative energy they contributed to the battalion's already low morale.

Failure to Meet Reenlistment Quota: "We haven't met our goals in three months."

In a three month period, the battalion failed to meet Division reenlistment standards. However, it appeared that one of the companies had a fine reenlistment program. In the spirit of competition the company commander was not sharing his methods with the other companies nor with the battalion staff.

Implications:

Competition within the battalion, particularly around the issue of reenlistment had become dysfunctional. To foster healthy competition and create positive energy/enthusiasm for the subject of reenlistment, the workshop would have to develop a vehicle to accomplish these tasks.

The data also indicated that each company had a different set of problems in trying to reenlist soldiers. If our workshop provided a forum for all of the companies to work "issues" generated in the data in a similar manner, it would be confusing and meaningless. We needed to create a means through which each company could create its own solution to its own unique problems of reenlistment.

OE TECHNOLOGY

Assessment:

Individual interviews were conducted with key battalion members during the assessment phase. Those selected for interviews were considered essential for the success of the reenlistment operation.[2] These individuals included the battalion commander, the CSM, the XO, the S-1, company commanders, and the battalion re-up NCO. Also interviewed was the brigade commander.

Group sensing sessions were conducted with groups of E1s-E4s, E5s, E6s-E7s, 1SGs, platoon leaders and the company re-up NCOs from each company.[3]

Various types of questions were used. Questions included: "What are the barriers to reenlistment in the battalion and what are the things in the battalion which enhance reenlistment?" -- "What should the battalion stop, start, and continue[4] doing to improve reenlistment in the battalion?" -- and "What are the strengths and weaknesses in the battalion which either promote or act as barriers to reenlistment?"[5]

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[2] *Other members in the organization can be included. In another case we invited platoon sergeants as well as the entire staff at the request of the battalion commander who had identified these individuals as critical to reenlistment in his organization. Inviting outsiders (e.g., those from brigade and Division) would inject tension in the group as the latter would be seen as "outsiders".*

[3] *A variation in questioning had to be used for company re-up NCOs in order to maintain confidentiality. The question, "What kind of person do you think the re-up NCO needs to be in order to achieve a higher reenlistment goal," was useful. The latter question illustrated how idealistic the re-up NCO had become and why they felt so "paralyzed" in their role (i.e., both the task and the role had become monumental). (For role synopsis, see Incl 1).*

[4] *The variety of questions helped surmount resistant groups. The more negative the group, the more useful the "stop, start and continue" question. Also, data was later collapsed into problems for First Termers and Careerists.*

[5] *A variation: In another reenlistment operation a questionnaire was used. This questionnaire was developed by Dr. Elyce Milano in conjunction with Dr. Alan Stanchfield and MAJ Bill Langford. The questionnaire was not used as part of the pre-work for the present workshop. However, the questionnaire provides the OESO with still another technique to deal with the problem of reenlistment. A copy of theis questionnaire and the assessment techniques can be obtained from Dr. Milano, OECS, Fort Ord, California, 93941.*

Planning:

The battalion commander was fed back the results of the assessment data and assisted the OESO team in designing the workshop. The implications discussed in THE SITUATION (above) were integrated into the workshop design. Evaluation would consist of comparing the monthly battalion reenlistment rates with brigade goals. In addition, we wanted to develop an internal sustainment (skill transfer) capability to reinforce the reenlistment program (discussed later in the paper under OE TECHNOLOGY, Event #7).

The planning phase also involved pre-work for the participants (See Incl 2). Participants were issued a copy of the data and asked to select ten critical issues they felt existed which were serving as barriers to reenlistment for First Termers and Careerists. Participants were given an illustration of an SOP from a neighboring battalion. Although the SOP was very general, it served as a basis to prepare participants for the idea that in the workshop their activity would be generating an SOP for their own particular battalion.

Workshop Design:

This section includes a description of events which took place in the workshop along with an explanation and/or rationale for each step. Workshop participants included the battalion commander, the CSM, the battalion staff, company commanders, 1SGs and the re-up NCOs. The workshop agenda is shown in Figure 1.

Figure 1.
BATTALION REENLISTMENT WORKSHOP AGENDA

TIME	EVENT	ACTIVITY
Start: 0800	1	Introduction
	2	Analysis of issue/data identification
	3	Report out/identification of commong themes/assignment of areas of responsibility
	4	Action planning and development of battalion/company reenlistment SOP
Break: 1130-1230		
	5	Report out of plans, problems and support requirements
	6	SOP staff coordination/trouble shooting
	7	Career transition planning briefing
Closure: 1730	8	Commander's closing remarks and reenlistment ceremony

Event #1: Introduction

Commander initiates the session by outlining the objectives and provides comments on his/her reenlistment philosophy and introduces the OESOs.

Rationale:

It is important at the outset that the commander state his/her philosophy of reenlistment. The statement of philosophy should include how the battalion feels towards the enlisted community, the belief that reenlistment must be a total team effort, and that coordination is required between the line and staff to have a supportive reenlistment environment. The belief that reenlistment must be a team effort needs to be reinforced periodically throughout the workshop. (Spinoff effects of such reinforcement may point to the need for team effort around other issues in the battalion.)

Event #2: Issue Identification and Analysis of Data

a. Break participants into four (peer) groups. In our case it included battalion staff, company commanders, 1SGs and the re-up NCOs. (The CSM is given the option of being either with the staff of with the 1SGs.)

b. In each of the groups the OESO lists the group's expectations and concerns for the workshop.

c. The groups consolidate their list of factors that serve as barriers to reenlistment (developed individually the night before) into one list.[6] In addition, we also requested that they list

[6] *Pitfalls: "What if your data isn't current?" If the data you present for participants to select out major themes is not current, expect that the energy in the group will not pick up as fast as it does when it is current. With less current data, the group will not become enthusiastic until Event #6; whereas, with more current data expect an energy surge around Event #3. Also,with less current data, groups will generate additional data resulting in the session becoming another assessment. The data in this case will be: 1) workable, but not as specific as it is when done prior to the meeting, and 2) it will contain "perceptions" of what First Termers and Careerists need rather than what those groups themselves indicate they need.*

factors that contributed to reenlistment in the battalion. The following format was used to collect this data.

Figure 2

REENLISTMENT CONTRIBUTORS AND BARRIERS

	Contributing Factors (+)	Barriers to Reenlistment (-)
For First Termers		
For Careerists		

d. It is important to establish a priority for "barriers to reenlistment." Criteria for establishing priority includes those that the group members feel have the most significant impact on reenlistment.

e. Each group prepares to report out its results to the entire group.[7]

Rationale:

Discussion of the assessment data generates energy in the group. However, this also can be a painful exercise if the data is particularly revealing. The rationale for breaking into "peer" groups relates to the fact that it is much easier to vent and/or react to the data in one's "peer" group, especially if the data reveals conflicts between groups who are also participants in the workshop. In mixed groups, officers may be embarrassed and NCOs feel disloyal causing the latter to remain mute throughout the discussion.

Issues for First Termers and Careerists need to be considered separately. Each has a separate set of problems even though there may be some overlap. Also, we tend to forget that the senior enlisteds are the role models for the First Termers. If senior enlisteds are not being taken care of professionally, they will not inspire anyone to reenlist. In such cases they are likely to tell the First Termer either

[7] *If it is not possible to have participants read the data the night before, the OESO can use a "data walk" (i.e., themes from the data are posted on the wall and participants are asked to pick major areas of contributing factors and barriers to reenlistment).*

directly or indirectly through their behavior: "If you stay in for a career, I'm a classic example of what you can expect to become." It is also important to look at both positive and negative reenlistment factors. Concentrating on only the negative issues drives a great deal of energy from the group.

Event #3: Report Out/Identification of Common Themes/Assignment of Areas of Responsibility

a. Each group reports out factors contributing to reenlistment as well as barriers to reenlistment.

b. Groups are allotted a four minute report out time. (If participants are not held to the time constraint, they will exceed the time required to complete the task.) A suggestion which has worked in the past is to assign the CSM the task of telling people when their four minutes are up.

c. As the group reports out, the OESO captures and consolidates the data by using the matrix contained in Figure 3.

Figure 3.

RESPONSIBILITY MATRIX*

ISSUES	Battalion Commander	XO	Company Commander	1SGs	Re-up NCOs
1. Communication					
2.					
3.					
4.					

*It is helpful in capturing this data to write the issue in the appropriate box and as similar issues appear, or even the same issue, write the substance of the issue beneath the first one listed. For example, if "Communication" is stated as a problem, the OESO would write beneath it, briefly, what this refers to. If "Communication" comes up again, the OESO would add additional brief comments beneath the major issues of "Communication."

d. Once the issues have been established, participants in the total group decide which elements have primary responsibility for action planning later in the day.

Rationale:

In assigning different areas of responsibility, the OESO sets up the first cut in having the battalion tackle the reenlistment barriers. In this case the line and staff recognize that each has different areas of responsibility with regard to reenlistment. This also prepares them for a coordination activity in Event #6 illustrating to them the necessity of collaboration to achieve higher reenlistment goals.

Often, there will be a host of issues listed. However, the surprising aspect here is that although the items are numerous, succeeding rounds indicate that the line and staff are capable of working a great many issues. This is a result of these issues being those that have concerned them on a long term basis. Moreover, the workshop simply provides a forum for the line and staff to address these issues.

Assigning areas of responsibility heightens awareness of a need for team effort around reenlistment.

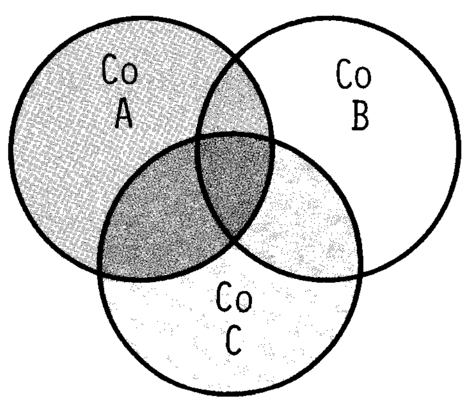
Event #4: Action Planning and Development of the Company/Battalion Reenlistment SOP

a. Break the participants into intact company teams with the battalion staff operating as an intact team as well.

b. The battalion staff and companies select out issues for action planning which are reenlistment barriers in their specific companies. The selection of different areas can be explained to participants at this point. Figure 4 illustrates the principle behind allowing each company to select out its own issues and construct individual company SOPs (which, in combination, comprise the battalion SOP).

Figure 4.

THREE RIFLE COMPANIES



c. It is useful to draw Figure 4 for the participants and to provide the following explanation as to why companies are being asked to work problems specific to their companies.

d. Explanation of Figure 4:

Standardized battalion and company reenlistment SOPs frequently overlook individual differences among companies. TOE rifle companies normally have the same organization and equipment but different sets of problems.

Assuming that we can represent a rifle company by a circle, Figure 4 depicts three different rifle companies. The shaded area represents the intersection of all organizations. That means on some dimension (e.g., the table of equipment) every company is like every other company.

The area represented by the parallel lines contains dimensions in which a company is like some companies but unlike others. For example, some companies have created the role of field First Sergeant while other companies have no such role.

The area represented by the unshaded, unlined portions, portrays those features that are unique to the specific companies. The unique personality of the leaders, the unique company environment, the unique unit history of development, all create a combination of factors which are not found in any other organization. These are the factors which cause commanders to say, "My problem is different." In many respects their problems are different and company specific.

This workshop is designed to help intact company teams who possess unique information to design their own company reenlistment SOP and action plans based on their unique reenlistment environment.[8]

e. In addition to filling out action planning sheets (See Incl 3), participants were instructed to identify when they report out, assistance or coordination necessary outside of their companies needed to accomplish their plan.

f. Action plans are posted on the wall with lists of anticipated problems in executing their plans.

g. Checklist for unit reenlistment activities is handed out (See Incl 4) for companies to consider once the workshop is over.

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[8] *For additional information see Galbraith, J.R., Organizational Design, Addison-Westley Publishing Company, 1977.*

Rationale:

It is important to indicate to participants the significance of similarities and differences within the battalion with regard to company problems and battalion problems. This enables participants to analyze their environment accurately, allowing them to action plan precisely.

In having participants work to develop different types of plans in their companies, the facilitator is actually dealing with the issue of overcentralization. For instance, even though Division and brigade may remain overcentralized, the battalion may become more decentralized in dealing with its internal problems. It is ironical that the more decentralized the battalion internally, the better equipped it will be to respond to an overcentralized brigade and Division.

Event #5: Report Out of Plans, Problems, and Support Requirements

a. Companies and battalion staff report out action plans, anticipate problems, and support requirements.

b. As the participants report out, the OESO is capturing the following information to be used in Event #6. Figure 5 illustrates the type of format the OESO uses to collect this data.

Figure 5.

SUPPORT REQUIREMENT MATRIX

ISSUES	FROM	TO	SUPPORT REQUIREMENT*	RESPONSE	TIME

* A brief statement of what is needed from whom to resolve issue.

Rationale:

Participants become aware of the necessity of collaboration. It is also at this point that healthy competition is injected into the workshop for the first time between intact company teams.

The report out unfreezes those within the company who are more successful with reenlistment programs to share their unique techniques with other companies. At this point a variety of techniques become public information. It is also at this point that those who are less successful in their reenlistment programs are taking notes fast and furiously.

Event #6: SOP Staff Coordination/Trouble Shooting

a. Battalion staff and companies respond to anticipated problems and support requirements. Most of these issues are directed toward the battalion staff.

b. While the staff prepares its responses, the companies may revise their action plans/SOPs based on ideas generated during the report out. In other words, they may want to incorporate ideas for other action plans into their own SOP.

c. The staff and companies respond to each others' demands with the following three response codes: 1 = agree to outcome; 2 = disagree to outcome; 3 = issue requires research and we will get back to you on the following date, _______.

d. The battalion commander observes the exchange and trouble shoots proposed courses of action.

e. The battalion staff (i.e., the S-1) is given the responsibility for consolidating company plans and developing the finalized battalion SOP.

Rationale:

The coordination activity fosters collaboration between line and staff. The commander, during this activity, has an opportunity to determine how the line and staff work together.

Activity #6 pinpoints where the breakdown has occurred in the battalion concerning coordination around the issue of reenlistment and other areas as well. Finally, it is often the case that activity #6 generates problems that can be cleared up during the session.

Variation: "What if more coordination is needed?"

If it appears that more coordination is needed or you simply wish to let the coordination continue once the staff has responded, select the senior company commander to speak for the remaining companies and allow him/her to respond one final time to the staff for purposes of clarification.

Event #7: Career Transition Planning Briefing

a. Battalion members are provided a fifteen minute briefing on the career planning seminar.[9] This seminar, developed by Sergeant Edward Svestka, is for First Termers whitin six to nine months of ETS, including those enlisteds who are undecided regarding reenlistment plans or who plan to separate from the Army. The seminar was designed to assist the soldiers in exploring the various future career options prior to transitioning from the service. For those soldiers who were absolutely certain of leaving the service, the workshop provides them with support and a feeling that the Army is "taking care" of them in return for their service. These same soldiers' morale changed from negative (e.g., "No one cares what happens to me") to positive (e.g., "They're taking care of me") resulting in a more supportive battalion reenlistment climate. Over fifty percent of those who came to the workshop undecided, elected to reenlist.

b. Immediate spinoffs from the seminar include a higher retention rate and more importantly, a favorable reenlistment climate stemming from the soldiers' appreciation of their commander's concern for their welfare.

c. The battalion XO, in conjunction with the battalion reenlistment NCO, is now conducting these seminars on a monthly basis.

Rationale:

Typically, commanders simply write off those who decided they are not going to reenlist. However, when they do this, they deny that these same individuals have impact on their battalion. Unfortunately, because these individuals have decided not to reenlist, if their needs are not met in some small way, they can only hurt the battalion as a whole if they choose to be negative. Consequently, it is to the commander's advantage to deal with this "potential source of negative energy" by neutralizing it. The career transition workshop services this purpose.

In addition to neutralizing those leaving the service, it serves as a mechanism to clarify for those "still on the fence" career possibilities. Because the transition speaks of "career-orientations" rather than simply reenlistment, First Termers may for the first time put their military experience in the context of a "career" rather than a one-shot tour. By doing this they look at the realitites of their situation, and for at least fifty percent of them, they discover that the Army offers them the best future.

[9] *This seminar can be obtained by writing to LTC Gerald Pike, OECS, Fort Ord, California, 93941.*

The career transition seminar provides the battalion an internal method of sustaining the reenlistment program. Each session provides the commander with current sensing data on the enlisted community's attitudes toward the battalion. Thus, the seminar serves the function of neutralizing the negativism of those leaving the services while at the same time giving the commander a pulse of the organization such that he may or may not wish to implement changes in the battalion as a whole.[10]

Event #8: Commander's Closing Remarks and Reenlistment Ceremony

The Commander's closing remarks consist of the following: summary of the day's activities, observations on process, indications of his support for the career planning workshop, stressing the fact that reenlistment is a total team effort and reaffirming his commitment to creating a positive reenlistment environment. Lastly, he reviews the workshop goals and expectations and comments on whether or not the workshop has achieved its purpose.

The last activity is a reenlistment ceremony. This ends the workshop in a very positive vein.

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[10] *Variation: Careerists. Although this career transition seminar is only conducted for First Termers, it might be extended to Careerists as well. The purpose here would be to take care of the professional needs of those to whom the First Termers look as role models.*

Another neglected area is that of the rate of the officer resignations in conjunction with the reenlistment figures. Often, when the reenlistment rates are low, the officer resignation rate is high. The OESO may wish to take this data into account and look into the professional development of the officer corps as well as in the battalion.

OUTCOMES

Chronological reenlistment outcomes are listed below:

October 1979

The brigade reenlistment objective for the battalion was 3 First Termers and 1 Careerist.

The battalion achieved the reenlistment of only 1 First Termer and 1 Careerist.

November 1979

The brigade reenlistment objective for the battalion was 2 First Termers and 1 Careerist.

The battalion achieved the reenlistment of only 1 First Termer and 1 Careerist.

30 November 1979

Conducted 1-day reenlistment workshop and implemented Career Planning Seminar and established company and battalion SOP.

December 1979

The brigade reenlistment objective for the battalion was 2 First Termers and 1 Careerist.

The battalion achieved the reenlistment of 5 First Termers and 3 Careerists.

January 1980

The brigade reenlistment objective for the battalion was 2 First Termers and 4 Careerists.

The battalion achieved the reenlistment of 2 First Termers and 5 Careerists.

February 1980

The brigade reenlistment objective for the battalion was 2 First Termers and 1 Careerist.

The battalion achieved the reenlistment of 3 First Termers and 3 Careerists.

March 1980

The brigade reenlistment objective for the battalion was 1 First Termer and 3 Careerists.

The battalion achieved the reenlistment of 5 First Termers and 4 Careerists.

April 1980

The brigade reenlistment objective for the battalion was 2 First Termers and 1 Careerist.

The battalion achieved the reenlistment of 4 First Termers and 2 Careerists.

OVERALL RESULTS TO DATE OF REENLISTMENT AND CAREER LIFE PLANNING WORKSHOP

1. Battalion achieved brigade reenlistment goals for the entire quarter (October-November-December).

2. Battalion increased its reenlistment for First Termers by 250% and 300% for Careerists during month of December.

3. Battalion has exceeded the brigade reenlistment objectives every month beginning in December 1979 to present.

ASSESSMENT OF ORGANIZATIONAL COST

1. Assessment

INTERVIEWS	NUMBER	TIME	TOTAL HOURS
Bn Cdr	1	2	2
S-1	1	1	1
Co Cdr	4	1	4
Plt Ldrs	4	2	8
1st Sgts	4	2	8
E1 - E4s	10	2	20
E5 - E6s	10	2	20
Re-up NCOs	5	2	10

2. Feedback

Feedback of assessment results to Bn Cdr	6

3. Planning

Design of workshop with Bn Cdr	2

4. Conduct of re-enlistment action-planning workshop 9

5. Monthly 8 hour career seminar session

CSM	8
Bn re-enlistment NCO	8
9 EMs	72

TOTAL BATTALION TIME 178

TOTAL OESO TIME 49

GRAND TOTAL 227

ROLE SYNOPSIS:

REENLISTMENT NCOS' CRITERIA FOR A REENLISTMENT NCO

1. It should be a man who is career minded, and has an overall good attitude toward the Army. He must be truthful and sincere.

2. It should be someone who is professional in his duty and in performance of his duty, someone with high spirit, easy going, good military bearing.

3. Someone with good military bearing. At least a second termer.

4. It should be someone who has retainability of at least one year.

5. It should be someone who is knowledgeable of the program.

6. Anyone who takes it on should have high morale. He should have a firm understanding of FMs, TMs, etc.

7. It should be someone with a good educational background, someone that the troop looks up to.

8. It should be someone picked by the 1SGT, although with the favoritism around here maybe someone really good wouldn't get it then. Right now the Company commander selects the guy and he really is out of touch with who is or is not good or more importantly looked up to by the troop.

9. It should be someone who is able to work and go places when he needs to like to Division, Brigade, and other offices in the division. He needs transportation.

10. It should be a reward not a punishment to be a reenlistment NCO.

11. He should be able to talk and inform people of the options in the military and civilian community.

12. Should be able to speak to people easily, regardless of rank.

13. It should be someone who has reenlisted at least once and has his sights on being career-minded.

14. He should set a good example for his subordinates as well as the unit itself. Also, he should have his own goals in mind before trying to counsel others on theirs.

15. The job itself should be his only one.

SUBJECT: Reenlistment Workshop

1. A reenlistment workshop will be held ____________________.
The workshop will begin at 0800-1730 hours.

2. The goals of the reenlistment workshop are to:
   A. Identify reenlistment issues for First Termers and Careerists.
   B. Establish a reenlistment team effort by clarifying reenlistment roles and responsibilities as they pertain to: Bn Cdr, the staff, the CSM, Company Commanders, 1SGs, Company Reenlistment NCOs and the Bn Reenlistment NCO.
   C. Develop a plan to increase reenlistment both on a short and long term basis.
   D. Create an understanding and support for the Career Transition Seminars (i.e., a transition workshop for personnel who are within 30 to 90 days of their ETS and have identified themselves as undecided or firm in their decision to ETS).

3. As a participant of the workshop, complete the following steps:
   A. Read the data collected from an organizational slice of the battalion.

      In reading the data, remember that it is made up of perceptions. To some of these perceptions you may find yourself saying "But that's not true." You may even find yourself becoming defensive (irritated) as you read the data.

      To fully appreciate the data, keep in mind that people see these perceptions as being real, even if they are not based on fact. These perceptions guide their behavior and may act as barriers to reenlistment in your organization.

      As you read the data, remember to say to yourself at least five times "These are only perceptions. The information is neither true or false. It is what people believe to be true (i.e. fact)."
   B. Before you come to the workshop, generate a list of issues based on the data which appears to you to be significant barriers to reenlistment for First Termers and Careerists.
   C. Read the Reenlistment SOP used by the _______ Bn. This SOP is intended only as an illustration of reenlistment policy put in the form of a plan. It includes a reenlistment philosophy and an illustration of team effort (e.g., the roles of the Bn Cdr, Company Commanders, Reenlistment NCOs, are clearly defined).

      In reading this SOP, be thinking of how your organization might create its own philosophy and Reenlistment SOP.

4. Keep the data confidential. Do not share the contents of the data with anyone. This data will be turned into the OESO at the reenlistment workshop.

PLANNING WORKSHEET

STATEMENT OF THE ISSUE AND IMPACT IT IS HAVING

ISSUE:

IMPACT:

PRESENT RESOURCES: AND/OR POSITIVE ACTIONS ALREADY OCCURRING:

SATISFACTORY COURSE OF ACTION WOULD

ACHIEVE

AVOID

SPECIFIC RECOMMENDATIONS (WHO, WHAT, WHEN, HOW, AND WHY) TO INCLUDE LEVEL(S) OF IMPLEMENTATION:

You've been in Command for about two months now, and you have noticed that the reenlistment program is going downhill. On Monday morning, as you're walking into your office, you happen to run into the Senior Reenlistment NCO. You stop him and ask him, "Sergeant, why aren't we making objective?" Without thinking he replies, "Well, we were, Sir, UNTIL YOU TOOK CHARGE!"

ARMY REENLISTMENT

WHAT IS WRONG WITH MY REENLISTMENT PROGRAM? Nothing? Great! Then there is probably no need for you to bother with the remainder of this Publication. However, if you feel there is something wrong with your program, or if you think your program could be improved, then this booklet may give you a few ideas.

Where do we start? My Reenlistment Personnel first; they're the people responsible? NO! My Commanders; they're responsible? NO! My officers and NCO's? NO! Well then, the individual soldier; aren't they the people who created the problem in the first place by not reenlisting? NO! Well, where do I start? With you! ME? Yes, you. Ask yourself objectively, if I had to work for myself, would I reenlist? Think now. I hope the answer is yes. Ask yourself a few more questions.

- Have I recently explained to my commanders, officers, NCO's, and the soldiers in my unit what my objectives are, and WHY I want to achieve them?

- Have I taken the time to TALK WITH my personnel to ascertain the true nature of their problems?

- Have I taken disciplinary action without knowing all the facts?

- During the decision-making process, have I considered what effect my decisions will have on the soldiers in my unit, AND their families?

- Have I ever taken any actions, or adopted attitudes that have shaken the motivation of a soldier to the extent that he/she can hardly wait to get out?

- Have I taken any POSITIVE actions to influence an officer or enlisted person to remain on active duty in the service of his or her country?

- Have I, BY EXAMPLE, inspired those who serve with and under me to remain in the Army?

- Have I kept the thought in mind, that those who serve with and for me, regardless of rank, age, and years of service, are not only soldiers but also human beings? (FACT: Regardless of your rank, you can't order a man to reenlist.)

- Have I, as a leader, practiced the old adage, "Take Care of the Troops?"

- If I were to be court-martialed tomorrow for "conducting a premeditated Reenlistment Program," would there be enough evidence to convict me?

CHECKLIST FOR UNIT REENLISTMENT ACTIVITIES

UNIT INSPECTED: ______________________ DATE: ____________

COMMANDER: ______________________ DATE ASG: ____________

REENL OFFICER: ______________________ DATE ASG: ____________

REENL NCO: ______________________ DATE ASG: ____________

SECTION A (Administrative)

		YES	NO	REMARKS
1.	Is the unit reenlistment facility adequate and does it provide privacy? (AR 601-280, para 1-13)	____	____	____________
2.	Is the unit reenlistment facility suitably identified? (AR 601-280, para 1-13)	____	____	____________
3.	Has the unit reenlistment officer been appointed in writing? (FORSCOM Suppl 1 to AR 601-280, para 109, line I)	____	____	____________
4.	Has the unit reenlistment NCO been appointed in writing? (FORSCOM Suppl 1 to AR 601-280, para 1-12, line g)	____	____	____________
5.	Does the unit reenlistment NCO (Additional duty) meet the standards prescribed by para 1-12g, FORSCOM Suppl 1 to AR 601-280?	____	____	____________
6.	Is the unit maintaining complete statistics on the reenlistment program for the past 12 months? (FORSCOM Suppl 1 to AR 601-280, para 1-9)	____	____	____________
7.	Are the following publications current and available at the unit reenlistment facility? (AR 601-280, Suppl 1, para 1-49)	____	____	____________
	a. AR 600-9, The Army Physical Fitness and Weight Control Program.	____	____	____________
	b. AR 601-280, Army Reenlistment Program.	____	____	____________
	c. FM 22-101, Leadership Counseling	____	____	____________
	d. FORSCOM Suppl 1 to AR 601-280.	____	____	____________

		YES	NO	REMARKS
8.	Are missing regulations and changes on current requisitions? Date of Reqn ___			
9.	Has the primary duty reenlistment NCO inspected the Reenlistment Data Card file and are the results of the inspection recorded on the "Record of Inspection" (FORSCOM Suppl 1 to AR 601-280, para 1-21, line e)			
10.	Has the unit commander inspected/monitored the Reenlistment Data Card File monthly. (FORSCOM Suppl 1 to AR 601-280, para 1-9, line b)			
11.	Are copies of inspections conducted by the primary duty reenlistment NCO during the past 6 months maintained in the Reenlistment Data Card File? (FORSCOM Suppl 1 to AR 601-280, para 1-21, line e)			
12.	Is the Reenlistment Card Data File established IAW APP E, FORSCOM Suppl 1 to AR 601-280?			
13.	Is there a Reenlistment Data Card for each member of the unit grade E-6 and below? (FORSCOM Suppl 1 to AR 601-280, para 1-21, line a)			
14.	Are entries on the Reenlistment Data Card current and correct? (FORSCOM Suppl 1 to AR 601-280, APP E)			
15.	Are Reenlistment Data Cards for ineligible personnel identified with a red tab? (FORSCOM Suppl 1 to AR 601-280, para 1-21, line d)			
16.	Does the DA Form 1315 reflect that ineligible personnel have been informed of their ineligibility and procedures for attaining eligibility? (AR 601-280, para 1-27b(1))			
17.	Have all personnel been given a job performance interview during the period 60-90 days after assignment? (APP E, FORSCOM Suppl 1 to AR 601-280)			

SECTION C (Unit Reenlistment NCO)

		YES	NO	REMARKS
1.	Is the unit reenlistment NCO familiar with the basic qualifications for enlistment/reenlistment UP Chap 2, AR 601-280?	____	____	________
2.	Does the unit reenlistment NCO understand the reenlistment options outlined in Chap 4, AR 601-280?	____	____	________
3.	Is the unit reenlistment NCO familiar with the procedures involving:			
a.	Lost Time (AR 601-280, para 2-22b)	____	____	________
b.	Overweight (AR 600-9)	____	____	________
c.	Overage (para 2-12, AR 601-280)	____	____	________
d.	Extensions (para 3-2, AR 601-280)	____	____	________
e.	Selective Reenlistment Bonus (DA msg 310800Z Aug 77)	____	____	________
f.	Reenlistment Interviews (FORSCOM Suppl 1 to AR 601-280, APP E)	____	____	________
g.	Submission of waiver requests (Chap 2, AR 601-280)	____	____	________
h.	Bar to Reenlistment (para 1-31, 1-32, 1-33, AR 601-280)	____	____	________

SECTION D (Unit Commander)

1.	Is the unit commander familiar with the following reenlistment procedures?			
a.	Overweight program (AR 600-9)	____	____	________
b.	Bar to reenlistment (AR 601-280, para 1-31, 1-32, 1-33)	____	____	________
c.	Lost Time (AR 601-280, para 2-22, line b)	____	____	________
d.	Reenlistment Interviews (FORSCOM Suppl 1 to AR 601-280, APP E)	____	____	________

	YES	NO	REMARKS
e. Selective Reenlistment Bonus (DA msg 310800Z Aug 77)	_____	_____	_______________
f. Expensions (para 3-2, AR 601-280)	_____	_____	_______________
g. Options (Chap 4, AR 601-280)	_____	_____	_______________
h. Qualification for Reenlistment (Chap 2, AR 601-280)	_____	_____	_______________
i. Submission of Waiver Requests (Chap 2, AR 601-280)	_____	_____	_______________
j. Is the unit commander familiar with the USAR CCC?	_____	_____	_______________

SECTION E (Attainment of Objective)

	1st Term	Career	Overall
Reenlistment objective for past ____ months	________	________	____________
a. Number reenlisted	________	________	____________
b. Percentage	________	________	____________

SECTION F (Remarks)

If It's Behavior, You Can Assess It

Part I

• MAJ Jim Howerton
• SFC Leo Stuyt
Human Resources Office
Fort Carson, CO

Major Howerton entered the service in 1968 following graduation from Indiana University. He has graduated from Rotary Wing Flight School, the Armor Advance Course and OECS. He has served overseas tours in Vietnam and Korea. He is completing a Masters degree in Communication with emphasis on leadership in the organizational setting. Presently he is Chief of the LEAD Center, 4th Infantry Division (Mechanized).

SFC Stuyt entered the service in 1969. He has graduated from the TASCOM NCO Academy and ANCOES Fort Benjamin Harrison. He has served overseas in Germany for the majority of his career. He holds a B.S. in Sociology and a M.S. in Counseling and Human Development. Presently he works for Major Howerton as the NCOIC at the LEAD Center.

The newest bit of jargon the OESO must contend with is "Assessment Center Methodology." What is it, what does it do, and how did it get into the Army's vocabulary? An "assessment center" is a method, not a place. Assessment center participants engage in a variety of job-related exercises which are designed to bring out behavior relevant to skills or dimensions determined by the organization to be critical to success. Managers who have been successful in the target-level job and have been trained in the assessment process observe and evaluate this behavior.

There is nothing mysterious about the assessment center method. Managers observe and evaluate the behavior of their subordinates every day. By controlling the circumstances and situations, the assessment center method merely intensifies this process. By placing participants in situations similar to the ones in which they will be required to form in the target job, the process is made relevant and meaningful to all participants. Training the managers (observers), giving them a structured method to use in observing relevant behavior, and subjecting each participant to the same treatment, all improve the odds for an accurate prediction of future job success. Therefore, individual developmental needs are realistically identified.

The essence of an assessment is that it combines information from multiple observers, using a variety of exercises before the individuals behavior is evaluated. Prior to the final evaluation, behavior is classified into specific job-related dimensions. A dimension is a management or supervisory skill or personal attribute which can be behaviorally defined and under which job-related behavior can be logically and reliably classifed. There is a specific procedure to determine and define the dimensions to be used. A job analysis is conducted to formulate a behavorial job description. Interviews, surveys and data analysis are used to select the specific dimensions for the target job. Depending upon the complexity of the target job, an organization will select from 9-15 dimensions. Included could be such diverse ones as oral communication, listening, sensitivity, problem analysis, judgment, decisiveness, delegation and leadership. Typically a combination of interpersonal, administrative and management skills are measured. The increased accuracy of this technique in comparison to customary supervisory ratings (for example OER's and EER's in the Army) has been demonstrated in more than 25 well-controlled research studies conducted in both large and small organizations.

The modern day assessment process had its beginning during WW II with the Office of Strategic Services (OSS). There was a critical need to identify individuals who would serve as agents to undertake secret and often hazardous intelligence-gathering missions. Some 5,000 individuals were assessed in a variety of procedures which included stressful interviewing, map memory, obstacle courses, interrogation procedures and a variety of "spy skills." A complete history of the OSS assessment is found in *The Assessment of Man* prepared by the OSS staff.

The most comprehensive study conducted to date is directed by Douglas Bray of AT&T. He is presently in the second 20-year study of assessment prediction for managers which began in the mid 1950's; tracing young college graduates throughout their development within the AT&T system. AT&T has the most comprehensive assessment program and research operation in the country today.

The assessment process is currently being used for a variety of purposes from manager and supervisor selection, performance appraisal counseling, and individual and organizational development. At first used by only large business organizations, the process is now employed by universities, military agencies, and a variety of smaller organizations. Several factors contributed to the rapid growth of assessment centers during the 70's:

first, there has been considerable scientific research conducted prior to implementation by major organizations,

second, many organizations have invested time and personnel into further research to enhance a climate open to personnel selection and development systems,

third, a great amount of professional and technical sharing has taken place among organizations using the assessment process and, fourth, many exercises, manuals and materials have been available on the market-place which has lowered the initial cost of the programs in terms of development resources.

The Fort Carson's Leadership Effectiveness Assessment and Development (LEAD) Center has integrated an assessment process for future company commanders into a two week company commander's training and development course. A job analysis was conducted in which company and battalion commanders were surveyed and interviewed to determine the specific dimensions to be used. Materials were selected and observers were trained. Observers are Captains and Majors who had successfully completed company command. They observe the participants in an assessment process consisting of an in-basket administrative exercise, a group discussion, a scheduling problem, an an interview simultation dealing with an employee whose performance on the job needs improvement. The development aspect of the program is a combination of a 3-day L&MDC design, managment and leadership workshops designed and presented by Ft. Carson's OESOs and presentations and discussions held by various agencies at Fort Carson. (See training outline at Incl 1)

One major benefit discovered at Fort Carson is that the observers seem to be gaining as much from the experience as the participants. The observers go through a one-week training program designed to prepare them to observe, record, classify and rate participants behavior (the assessment 4-step process). They then write reports and provide feedback to the participants. These skills are taken back to the observer's present job and provides for common standards of evaluating performance and a common vocabulary for describing behavior. The observers learn specific interviewing and oral communication skills as well as an appreciation for group dynamics, planning and organization techniques. Simply by participating in the assessment process the observers are more aware of interpersonal behaviors; they strengthen their own administrative skills and acquire a broader base of problem solving techniques.

An awareness of the validity and applications of the assessment process is growing throughout the Army. The following projects are being developed at the present time. The Army Research Institute has contracted to start an assessment process in some 200 ROTC schools. A testing phase is to run from March to September 1980 with implementation to follow. The proposal is to assess the sophomore class for selection to and development within the advanced military science course. TRADOC is studying the possibility of establishing an assessment center in the precommand course at Fort Leavenworth. Fort Benjamin Harrison is starting and assessment center for recruiters. Prior to the current OESO class (1-80) 32 of the OEC&S faculty were trained as observers in the assessment process. The first class of 1980 participated in a pilot effort was assessed and given feedback based on exercise. As the course progresses twelve of the students will be assessed on two more exercises. Two of the goals at OEC&S for this pilot effort are to develop a common vocabulary for describing behavior and a common standard for evaluating behavior. The assessment data at OEC&S will be used by the participant and faculty advisor for individual development throughout the course.

Fort Carson will continue its 2 weeks LEAD Center course for future company commanders using the assessment process and development workshops. Also an in-depth review will be undertaken in early 1980 to see whether there is a benefit to the LEAD Center graduates as compared to company commanders who have not attended the LEAD program.

As can be seen by the aforementioned projects there are a lot of somewhat uncoordinated efforts undertaken to incorporate the assessment process in the US Army. Some questions, that need answers, are:

1. At what supervisory or management level will the assessment process be of most value to the U.S. Army? The assessment process can be applied to drill sergeants, first sergeants, recruiters, ROTC students, company and battalion commanders; thus a comprehensive implementation strategy is needed.

2. At what level might the assessment data be used as part of the selection criteria as compared to the developmental design of the programs now operating?

3. If the program is to be used for development of the participants, should the supervisor have access to the assessment data so as to assist in the developmental process?

4. And lastly, what should be the Army's strategy for implementation of assessment centers, training of observers and administrators, and the development and procurement of assessment materials?

Perhaps answers will come to some of these questions as more and more organizations incorporate the assessment process into their training and development programs for the Army's leaders. If it's behavior you can assess it.

REFERENCES

Bray, D. W., Campbell, R. J., and Grant, D. L. Formative Years in Business: a long-term AT&T study of managerial lives. New York: Wiley Interscience, 1974.

Byman, William C. and Moses, Joseph L. Applying the Assessment Center Method. Elms Ford, N.Y.: Pergammon Press, Inc., 1976.

Office of Strategic Services (OSS) Assessment Staff. Assessment of Men. New York: Rinehart, 1948.

LEAD CENTER SCHEDULE

WEEK ONE

DATE	TRAINING	TIME
Monday	Orientation & Team Buidling For Participants	0800-1000
	Situational Leadership, FIRO-B, FIRO-F,	1000-1130
	Values Workshop	1300-1630
Tuesday	Assessment Center Orientation	0730-0800
	Assessment Process	0800-1630
Wednesday	Assessment Process	0800-1130
	ED	1300-1430
	In-Basket Interviews	1430-1630
Thursday	Inventory Accountability	0730-0930
	Army Community Services	0930-1130
	Team Buidling Workshop	1300-1400
	Time & Meeting Management	1400-1630
Friday	Organizational Process Workshop	0730-0930
	Staff Judge Advocate Briefing	0930-1130
	Assessment Feedback	1300-1630

WEEK TWO

DATE	TRAINING	TIME
Monday	Leadership & Management Development Course	0730-1630
Tuesday	Leadership & Management Development Course	0730-1630
Wednesday	Stress Management and Strength Deployment Inventory	0730-1130
	Finanace Briefing	1130-1330
	Maintenance Management	1330-1630
Thursday	Role Clarification, Problem Solving Goal Setting	0730-1130
	Training Subjects SQT/ARTEP	1300-1430
	Leadership & Motivation	1430-1630
Friday	Leadership Transition Design	0730-0930
	CSM/1SG Panel Discussion	0930-1130
	Inspector General Briefing	1300-1500
	Unit Application/Critique	1500-1600
	Graduation	1600-1630

INCL 1

If It's Behavior, You Can Assess It

Part II

Assessment Process As A Developmental Tool For Future Company Commanders

MAJ Jim Howerton
SFC Leo Stuyt

The previous section provided an overview of the assessment process and a brief introduction to the Fort Carson Leadership Effectiveness Assessment and Development (LEAD) Center. We will now provide a more indepth look at our program and relate the significant findings based on initial data analysis of junior officer behavior.

The assessment program at Fort Carson got it's start when the then Commanding General, LTG Forrest, having attended the assessment workshop at the Center for Creative Leadership in Greensboro, North Carolina, directed that the Human Resource Office establish its own program. We looked at current civilian programs, past Army assessments, and Major Howerton was sent to the Center for Creative Leadership to participate in the management assessment program. Exercises were designed and in two cases rewritten from the Fort Benning Assessment program conducted from 1972-74.

The stated purpose of our assessments was to provide a development base for junior officers (future company commanders). Feedback was provided to over eighty officers during the first six months. But as far as a development program is concerned there was a lot left to be desired.

A two week program was designed and approved by the current Commanding General, MG Louis C. Menetrey. The design included skill-building workshops and an improved assessment process. The rationale, design and impact of the program follows:

RATIONALE

The mission of the LEAD Center is interwoven with the 4th Infantry Division goal of "Develop Our Leaders" and the FORSCOM PHILOSOPHY of: (1) Good training comes first and (2) Our most important product... - "Good Leaders". A Leadership Effectiveness Assessment and Development Center is of considerable value in assisting the division in reaching these goals. Our leaders must be developed in the behavioral along with the technical areas. The following program is designed to provide training and feedback in both these essential areas.

Participants in the LEAD program are lieutenants and captains expected to command at Fort Carson. In order to receive the most benefit from this program, future commanders are scheduled one to three months prior to assuming command. Offices, such as Command Finance and MEDDAC, that have junior officers in charge of large personnel sections, can also schedule participants on a space available basis.

DESIGN

Assessment Process - The two day assessment includes an in-basket exercise, an interview simulation, a scheduling problem, and an assigned role leaderless group discussion. A job analysis was conducted by use of a computerized survey and personal interviews with company and battalion commanders. From this data the Fort Carson dimensions were selected. The four appropriate exercises that simulate company commanders' activities were then chosen. Each of the exercises elicits behavior that is then categorized by dimensions. Two assessment groups are conducted simultaneously. Each group is composed of six participants, three trained observers, and one administrator. Feedback is provided to each participant prior to the end of the first week. The design allows for twelve participants during the remainder of the LEAD program.

-Figure 1-

LEAD-Center
Dimensions Observable

In-basket	Scheduling
Initiative	Oral communication skill
Planning and organization	Tolerance for stress
Judgement	Planning and organization
Decisiveness	Judgement
Delegation	Management control
Leadership	

Interview Simulation	Group Exercise
Oral communication skill	Oral communication skill
Listening skill	Listening skill
Tolerance for stress	Tolerance for stress
Flexibility	Flexibility
Planning and organization	Initiative
Judgement	Judgement
Decisiveness	Decisiveness
Management control	Leadership
Leadership	

Workshops - The leadership and management workshops provide the formal training for the LEAD Center. The workshops focus on motivational theories, leadership styles, time and stress management, organizational processes, creative problem solving, decision-making models, and a company commander transition design along with the Leadership & Management Development Course (L&MDC).

Command Subjects - The technical subjects are taught by experts at Fort Carson. In each case the director or deputy presents the information. Subjects include supply/inventory accountability, military justice, maintenance management, finance, training policies, equal opportunity, and ACS services.

IMPACT

The value of this approach is the concentrated incorporation of behavioral and technical skills into a meaningful training program for the junior officers soon to be taking command. A total division effort is being focused on the development of company commanders. The staff agencies and major commands coordinate in the presentation of the command subjects; the HRO staff conduct the workshops and L&MDC and division staff officers (captains and higher) assist in the assessment process as trained observers.

A total assessment is now possible for each officer taking command. The command subjects increase their knowledge in selected tactical and technical skills, the assessment process determines strengths and weaknesses in selected leadership and behavioral dimensions. The L&MDC, plus the training workshops, provide valuable management techniques and a fresh look at each officer's leadership behavior and style.

MAJ Howerton attended a civilian assessment center administrator training program which substantially improved the quality of feedback provided to each participant. A thorough job analysis was conducted to determine the specific dimensions and exercises to be used at Fort Carson.

The job analysis indicated a large amount of time was spent by company commanders on administrative matters. Thus, a thirty item administrative in-basket exercise was selected. Critical to success was the interaction of the company commander in a variety of formal and informal group discussions. An assigned role - leaderless group exercise was then selected. Another key behavior of the commander was the one-on-one interview situation. To a large extent this dealt with a counselling or performance appraisal subject. An interview exercise was selected that simulated a performance improvement counseling session. Finally a scheduling exercise was selected that related to tasking assignments often made by company commanders. A more complete description of each exercise follows.

In-Basket Exercise

The participant is asked to handle letters, notes, requests, etc., that have accumulated on a predecessor's desk. The participant must make decisions, delegate responsibility, assign work, plan, organize, and schedule activities based on the material in the basket.

A well designed in-basket has such high face validity and critical validity that it may seem simple to evaluate. However, it is a complex exercise requiring extensive observer training. To every extent possible the in-basket is unbiased and fair to either sex and all minorities. A real effort is made to show women and minorities at all levels of the organization. The exercise stresses planning and organization, judgement, delegation and management control.

Group Exercise

Acting as both individuals and team members, six participants are placed in competitive situations and are required to allocate funds or make other judgements on a variety of conflicting projects. Each participant has two tasks, (1) To win the acceptance of other group members in favor of their own proposal and (2) to assist the group in making the best decision for everyone concerned. Focuses on oral communication, initiative, leadership and flexibility.

Scheduling Exercise

This exercise requires participants, working alone, to schedule personnel, work assignments, establish priorities, and make decisions concerning overtime and other mission vs. people situations. The dimensions planning and organization, decisiveness and judgement are easily observed in this exercise.

Interview Simulation

This exercise deals with a performance improvement interview being conducted by each participant and a trained roleplayer. The participant must employ effective fact finding techniques and appropriate persuasion in getting the roleplayer to first 'see' the problem and second to commit to take action to solve the problem. Significant dimensions are listening, stress tolerance and decisiveness. A complete listing of the Fort Carson dimensions, and in which exercises they can be observed, is located in figure 1.

The list of workshops presented have now been redesigned to emphasize the dimensions shown in figure 2. Although the dimensions are not 'taught' they are discussed as to how they relate to the assessment process, real life situations, and the specific skill building workshops presented during the two week LEAD program. The participants now have an awareness of their behavior in specific situations, categorized by dimensions, along with knowledge and skills in how to apply their individual abilities in the most effective manner to their everyday life.

-Figure 2-

Fort Carson LEAD Center Dimensions
Observable by Workshops

VALUES (FIRO & LEAD)	- Stress - Flexibility - Planning & Organization - Judgement - Delegation - Management Control - Leadership
TEAM BUILDING	- Flexibility - Judgement - Decisiveness

-Figure 2 (cont.)-

TIME & MEETING MANAGEMENT	- Flexibility - Initiative - Planning & Organization - Decisiveness - Delegation - Management Control
PROCESS PERFORMANCE	- Oral Communication - Listening - Stress - Flexibility - Initiative - Planning & Organization - Judgement - Decisiveness - Delegation - Management Control - Leadership
L&MDC	- Oral Communications - Listening - Flexibility - Initiative - Judgement - Decisiveness - Leadership
STRESS MANAGEMENT	- Stress - Flexibility - Decisiveness - Leadership
STRENGTH DEPLOYMENT INVENTORY	- Stress - Flexibility - Initiative - Judgement - Decisiveness - Leadership
ROLE CLARIFICATION	- Flexibility - Planning & Organization - Judgement - Decisiveness - Delegation - Management Control
LEADERSHIP & MOTIVATION	- Oral Communication - Listening - Stress - Flexibility - Judgement - Decisiveness - Leadership

-Figure 2 (cont.)-

COMMAND TRANSITION OPERATION	- Listening - Flexibility - Initiative - Judgement - Decisiveness - Leadership

From the 1/2 day assessment process conducted July 78 through May 79 the question arose: "What is needed to give the participants a chance to increase their skills in order to function effectively as a company commander?" Figure 2 shows 10 workshops in which the dimensions are reiterated from a developmental viewpoint. The OESO's, OENCO and the LEAD Center staff conduct these workshops, which allow the HRO staff to maintain and improve their individual skills - a welcome side benefit from this program.

A detailed analysis was delayed until a sufficient number of future company commanders were rated in the Fort Carson's eleven dimensions. We now show the developing trend of the dimensions in figure 3. A short explanation is needed to show how we used this particular analysis method. We saw it to be more significant to analyze the dimensions than to see how the individual participants were rated, since we do not have a norm established against which a company commander can be measured. Rather we have focused on how many times a dimension was rated. Normally the dimensions are rated as many times as there are participants, however an additional feature of the assessment process is that a dimension rating can be "split" i.e., a participant can show a satisfactory performance in two or three of the four exercises, and show completely ineffective behavior (translated into a dimension) in another exercise. This will then influence the concensus rating of the three observers to the point that participant no. 1 for example is rated 4 in judgement in the group, in-basket and the scheduling exercises, but has a low judgement score of 1 or 2 in the job performance interview. The dimension rating system is five point scale, 1 & 2 being low or ineffective, and 3-5 being satisfactory or effective. The final concensus rating may then show up as 4/1 or 4/2. In this case the split rating is used rather than "averaging", so that more specific feedback can be provided to the participant. Therefore when a dimension is rated more times than the total number of participants, it is an indicator of a split rating. We consider the split rating significant in that it shows an inconsistency in the required behavior for the target job.

-Figure 3-

Fort Carson Lead Center
Dimensions Trend Analysis

DIMENSION	N =	DECIMAL CONVERSION	RANKING OF THE DECIMALS
ORAL COMMUNICATION	33	7/33 = .21	8
LISTENING	32	6/32 = .19	10
STRESS	33	9/33 = .27	5
FLEXIBILITY	32	8/32 = .25	6
INITIATIVE	35	7/35 = .20	9
PLANNING & ORGANIZATION	36	10/36 = .28	4
JUDGEMENT	36	18/36 = .50	1
DECISIVENESS	36	8/36 = .22	7
DELEGATION	25	1/25 = .04	11
MANAGEMENT CONTROL	39	18/39 = .46	2
LEADERSHIP	37	11/37 = .30	3

N = Number of times each dimension was rated; includes split ratings.

DECIMAL CONVERSION = The low rating as a function of each dimension.

RANKING OF THE DECIMALS = 1 is the most significant dimension, since it rated 50% of the time on the low or ineffective side of the scale. Two is the second most, etc.

Rating of the dimension = 1 or 2, low or ineffective rating. Three-five effective for the target job.

All data based on 30 participants, except with the dimension delegation, where 5 participants were not rated.

As can be seen in figure 3, the dimensions receiving the most ratings for being ineffective for the target job are judgement and management control. Fifty percent and 46% respectively of all the times they were rated, the scores fell on the low side. The importance of these dimensions will be stressed in the upcoming LEAD Centers. Figure 4 shows the dimensions in the low ranking order. Hopefully it is realized that at this point we only stress that these dimensions show a trend; no direct inferences should be drawn from these statistics until further follow-up studies are conducted. Following articles will include more complete follow-up with company commanders, their subordinates, peers and battalion commanders. Also included will be a discussion of proposed strategies and implementation plans for the assessment process throughout the Army.

-Figure 4-

Fort Carson LEAD Center
Dimensions as Ranked by Percentage of Significant Low Ratings

1.	JUDGEMENT	- 50%
2.	MANAGEMENT CONTROL	- 46%
3.	LEADERSHIP	- 30%
4.	PLANNING & ORGANIZATION	- 28%
5.	STRESS TOLERANCE	- 27%
6.	FLEXIBILITY	- 25%
7.	DECISIVENESS	- 22%
8.	ORAL COMMUNICATIONS	- 21%
9.	INITIATIVE	- 20%
10.	LISTENING	- 10%
11.	DELEGATION	- 4%

Computed based on how many times a dimension was rated on the low side of the scale, compared to the total number of the ratings each dimension received.

Sources and Resources

Several years ago an OESO sent a postcard back with the slogan "People respond to people who respond." In this section of the OE COMMUNIQUE I am responding to feedback and suggestions from the field regarding information about sources and resources that would be useful to practicing OESOs and OENCOs. If there's a subject area you'd like to see covered in future issues of the OE COMMUNIQUE please let me know.

The response to my suggestions for organizing the content of L&MDC in the last issue of the OE COMMUNIQUE was very positive and so in this issue is a checklist that I use to be sure I stockpile necessary handouts and supplies in advance. It was developed after I broke the record for the 100 meter dash to the Xerox machine for extra copies of a crucial handout. If you've devised other techniques for getting a handle on L&MDC, please send them to me. I'll include them in future issues of the OE COMMUNIQUE if you want to share with the world.

Following the L&MDC checklist is information about OE-related materials in a section titled FEED FORWARD, a term borrowed from LTC Frank Burns, OESO AT HQDA. It includes some welcome news about the ever-popular videocassette WHAT YOU ARE IS WHERE YOU WERE WHEN that was supplied to me by SFC Lonnie West, OENCO at Ft. Huachuca. In tracking down the details of Dr. Massey's new book, I was able to verify that the rumor of Dr. Massey's death is just that -- a rumor.

Lynn
Librarian, OECS

L&MDC Checklist

L&MDC -- ADVANCE PREPARATION

L&MDC -- HANDOUTS

TITLE	AMOUNT NEEDED
L&MDC STUDENT HANDBOOK	1 participant, 1 per trainer
HOMEWORK -- L&MDC (*)	1 participant 1 per trainer
MESS HALL WORKSHEET (**)	1 per participant, 1 per small group, 1 per trainer
AGI WORKSHEET (**)	1 per participant, 1 per trainer
WILDERNESS SURVIVAL WORKSHEET (**)	2 per participant, 1 per small group, 1 per trainer
WILDERNESS SURVIVAL ANSWER & RATIONALE SHEET (**)	1 per participant, 1 per trainer
FIRO ISSUES (optional) (**)	1 per participant, 1 per trainer
"INTRAPERSONAL CONFLICT RESOLUTION..." (***)	1 per participant, 1 per trainer
"DEFENSIVE COMMUNICATIONS" (***)	1 per participant, 1 per trainer

(*) indicates that handout may be Xeroxed from OE COMMUNIQUE, Issue No. 1-80, p. 145

(**) indicates that handout must be Xeroxed from L&MDC Trainers Manual

(***) indicates that handout is optional homework assignment (if not used, delete from Homework sheet)

L&MDC -- SUPPLIES

ITEM(S)	AMOUNT NEEDED
Easel	1 each
Butcher paper (newsprint)	1 pad
Masking tape	1 roll
Felt-tipped markers (wide tip)	1 box mixed colors
Notebooks or pads for journals	1 per participant
Pencils	1 per participant
3 x 5 cards	1 pkg (100), blue
Coffee pot	1 each
Cups, spoons	as desired
Coffee, tea bags, sugar, creamer	as desired

Feedforward

Addison-Wesley Publishing Company has added several new titles to their well-known OD series since the OE RESOURCE BOOK was published (See page 8-5 of the OE RESOURCE BOOK for a list of previously published titles.) ORGANIZATIONAL DYNAMICS: DIAGNOSIS AND INTERVENTION by John P. Kotter presents a model that can assist in assessing and planning for change in complex systems. Edgar H. Schein (Mr. Process Consultation) is the author of CAREER DYNAMICS: MATCHING INDIVIDUAL AND ORGANIZATIONAL NEEDS. A complimentary volume is ALTERNATIVE WORK SCHEDULES: INTEGRATING INDIVIDUAL AND ORGANIZATIONAL NEEDS, by Cohen and Gadon. Together they examine the interface between the employee and the organization and suggest procedures for narrowing the gap.

A new Addison-Wesley series, "Occupational Stress," was started in 1979 with six titles. The one with the widest application seems to be MANAGING STRESS, by Leon J. Warsaw. It is a non-technical general overview of stress from a middle-management point of view and includes information relating to the development of management-sponsored stress management programs. OESOs working at the top-team level may be interested in another book in this series: EXECUTIVE STRESS, by Leonard Moss.

Two titles have recently been added to the excellent "Management Applications Series" of Scott, Foresman and Company. One is TASK DESIGN AND EMPLOYEE MOTIVATION, by Aldag and Brief, which has possible application to both socio-technical interventions and the implementation of the new OER system. The other is ORGANIZATIONAL SURVEYS: AN INTERNAL ASSESSMENT OF ORGANIZATIONAL HEALTH, by Dunham and Smith, which appears to be a worthwhile handbook for basic survey design, administration and analysis.

Marcel Dekker has a relatively new series in "Public Administration and Public Policy," several titles from which seem to be good overviews of OE/OD in the public section. Golembiewski and Eddy have edited a two part work ORGANIZATION DEVELOPMENT IN PUBLIC ADMINISTRATION and Golembiewski has written the two part APPROACH TO PLANNED CHANGE. Part 1 of the latter is sub-titled ORIENTING PERSPECTIVES AND MICRO-LEVEL INTERVENTIONS; Part 2 is MACRO-LEVEL INTERVENTIONS AND CHANGE-AGENT STRATEGIES. Another title in the series that has promise is PERSONNEL MANAGEMENT IN GOVERNMENT: POLITICS AND PROCESS.

Fordyce and Weil are out with the second edition of their practical text MANAGING WITH PEOPLE, published by Addison-Wesley. The new edition seems sufficiently revised to warrant replacing your old edition if funds are available. French and Bell's standard (and many say the best) text ORGANIZATION DEVELOPMENT: BEHAVIORAL SCIENCE edition, published by Prentice-Hall. Material from the first edition does not seem to have been revised at all, but several new chapters have been added.

Dr. Morris Massey has finally published a book based on his values presentations. It's titled THE PEOPLE PUZZLE (easier to remember than the titles of his videocassettes!) and retails for $10.95. The source is Reston Publishing Company, ATTN: Sue Boling, 11480 Sunset Hills Road, Reston, VA 22090. For more information you can call Ms. Boling at a toll-free number 800-336-0338.

Dr. Massey's videocassette program WHAT YOU ARE IS WHERE YOU WERE WHEN... has at last been approved for purchase through the Army's Training Aid Support Center (TASC) system. The TASC catalog number for the program is TVT-20-73.

Individual units/offices can initiate an order for local acquisition of the program by sending a DF to their local TASC office. The DF should include title of the program, the TVT-20-73 designation of the program and the fact that the program is composed of two color videocassettes. The DF should request that TASC procure the program and hand receipt it to the requesting unit/office on a long-term loan, renewable every six months. Justification must be included on the DF for the unit/office to retain the program on-site instead of checking it out of the local film library periodically.

If the TASC has sufficient funds for such purchases and if the unit/office request is approved, the TASC will order the videocassette program, and upon receipt, will issue it to the requesting office. If TASC does not have sufficient funds for the order, they will return the order to the requesting office. There are then at least three options: 1) If the requesting unit/office has available funds they can give the TASC a fund cite for $295 and the TASC will place the order. 2) If sufficient funds are not available a cooperative venture might be planned with another unit/office that does have funds (Chaplains, CPO, etc.). 3) If all else fails the TASC can be queried again as to what level of demand is necessary to indicate the need for the local TASC to order the program, retain the program in its own collection, and check it out to all authorized borrowers using its standard check-out procedures. The entire process can easily take six months, so start early!

If you now use or are planning to use Dr. Massey's videocassettes, you may be interested in the very professional looking handouts that have been prepared by the producers of the video presentations. Copyright release has been given for the use of copies of these materials in conjunction with training. Samples of the handouts appear on the following pages. You can obtain originals by writing to Magnetic Video Library at the address on the handouts.

Lynn Herrick is the librarian at OECS.

Dr. Morris Massey's Series
"How to Understand Yourself & Others"

VISUAL GUIDES

What You Are Is Where You Were When

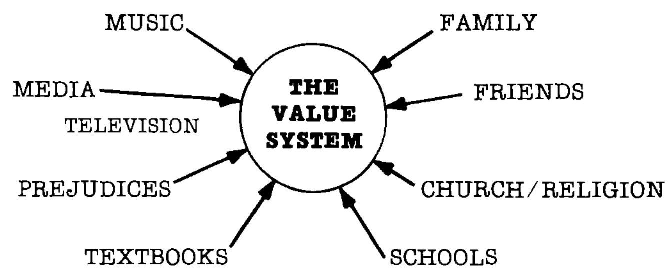
Produced by The Magnetic Video Library 23705 Industrial Park Drive Farmington Hills, MI 48024 (313) 476-1920

VALUE IMPLANT STAGES

Age Group	Value Period
1 – 2 – 3 – 4 – 5 – 6 – 7	**IMPRINT**
8 – 9 – 10 – 11 – 12 – 13	**MODELLING**
14 – 15 – 16 – 17 – 18 – 19 – 20	**SOCIALIZATION**
	21 and OVER **SIGNIFICANT EMOTIONAL EVENT**

VALUE SYSTEM PROCESSING

FORCES



AGE in 1975	When Value Programmed	Influence Factors
60	1920's	World War I Close Family Flappers Model T
50	1930's	The Great Depression Security
40	1940's	World War II —WIN— Family Decay Mobility
30	1950's	Affluence (The "Good Life" Arrives) (Korean War Ignored) Indulged Kids Dr. Spock (Misinterpreted) Television (The Electronic Babysitter) Hair Music Permissiveness
20	1960's	Space Program Bad Guy Heroes Civil Rights Kennedys Vietnam War Computers
10	1970's	Jaded Expectations Watergate

PULL BACK! Ask yourself that basic question: "Where were they when . . .
. . . when they were processing their values."

SYNOPSIS

What You Are Is Where You Were When

Produced by The Magnetic Video Library 23705 Industrial Park Drive Farmington Hills, Michigan 48024 313/476-1920

Introduction:

Why people behave as they do, especially when that behavior is different from ours, is a mystery to most of us. Many complex theories attempt to solve this mystery, but a more practical solution is needed. In answer, Dr. Morris Massey offers What You Are Is Where You Were When, a general model of human behavior.

According to Massey, deep-seated sets of values are "programmed" in at an early age and remain with us at a subconscious level, guiding our adult behavior. These values, or "gut-level" feelings, determine our world view: What is good or bad, right or wrong, normal or not normal, for ourselves and others.

Where do values come from?

Massey refers to the early stage of our lives as the Value Processing Stage. The first period, IMPRINTING, occurs from birth to age seven. During these years, parents are the major source of information. A child looks around and learns what a father, a mother, or an adult is like.

A period of intense MODELING follows Imprinting. By identifying and mimicking heroes, the preteen youngster imagines what kind of person she or he wants to become.

The teen years are a time of SOCIALIZATION. The young adult begins to seek a position in the peer group. Teen-age behavior must win everyone's acceptance. What do friends value? Where does everyone go? What is the right thing to do? The normal thing to do?

After age 20, the answers to these questions lock in for most people. What we value and how we relate to the world will remain the same for the rest of our adult lives. Only a SIGNIFICANT EMOTIONAL EVENT (SEE) will alter the basic values programmed in during the Value Processing Stage of human development.

On a national scale, the Depression, WW II, and the Vietnam War were SEEs for entire generations. Individual experience of these events found countless variations. The Wall Street wizard who lost everything but his family as he struggled to find work. The GI who had never been more than 50 miles from Peoria who enlisted and participated in the Liberation of Paris. That same GI's son, an unquestioning patriot after his father's own heart until his best friend was shot by a National Guardsman at Kent State.

Sweeping social change triggers countless SEEs, but SEEs can also occur at a personal level. The birth of a child; a divorce; being fired; or falling in love. It is also important to realize that SEEs do not have to happen suddenly. Consider an employer forced to hire minorities by an EEO regulation; after two years of working with Chicanos, blacks, and women, he discovers that they are just as hard-working and dependable as anyone else he has ever hired.

Whatever the circumstances or the reasons, the power of Significant Emotional Events should be recognized. They can break through all barriers of prejudice, pretense or pride. Whether they occur by design or coincidence, their impact changes our deepest gut-level values.

Common Forces: The Sources of Values

As we begin to analyze an individual's values, we can look at the forces that influenced his or her development. Several sources of information and experience interact, and their relative importance changes as the individual progresses from Imprinting to Modeling to Socialization.

The FAMILY is a major force in early programming. Specifically, family size, age, income, residence and emotional atmosphere will all heavily impact on individual development. FRIENDS, and the families of friends, are most critical during the teen years.

CHURCH and RELIGION play an important role in value programming of the young, who will later accept or reject complex concepts and dogma. In America, the influence of this source of values has been declining in recent years. The future role of religion in forming values will be important to study. Will churches undergo intense change, or will the old style of religious educa reassert itself?

The SCHOOL SYSTEMS have a wide range of influence on individuals, varying in principle and technique throughout the country. TEXTBOOKS and teaching methods used in educating the young affect values far more than most people realize. Consider "Dick and Jane": How does such "programming" affect attitudes and behavior?

The MEDIA are dominant forces in determining the values of young people today. If time is the major measurement of influence, the impact of TELEVISION on recent generations is second to no other source influencing values. The "electronic baby-sitter" is today's dominant home appliance. It is important to see the potential of television as an instrument of change: Archie Bunker reveals his prejudices to the nation every week. Many of us may have learned to see through his, and our own prejudices, after being "entertained" by the Bunkers for several years.

The affect of MUSIC, RADIO, VIDEO, and COMPUTERS cannot be ignored. People relate to the world through filters of media. If we hope to relate to people, both as individuals and in groups, we must learn to communicate by using these tools.

Groups of People (The Decades)

Although Massey stresses the importance of recognizing and allowing for individual differences, he feels it is equally important to look at groups of people holding similar values. He analyzes generations by decades and considers the social events influencing their values . . .

> People in their late 50's and early 60's in 1980 formed their values during the 1920's and 1930's. They are the Establishment: directors of major corporations, educational institutions and governmental organizations. They are extremely patriotic because of our nation's involvement in WW I and WW II. Stable neighborhoods and geographic limitations, as well as the impact of the Depression, strengthened the value they place on the family.

Values formed during this period are quite different from those of recent generations. . .

> By 1960, children had many dramatically new influences affecting their values. Technologically we headed for the moon, and launched into the computer age. Hero modeling began to shift to the bad guys. Social change, accelerated by civil rights legislation, was tremendous. The United States reacted far differently to Vietnam, its first unpopular war, than it had to any previous war. Parents, trying to overcome the deprivation they knew in the Depression, were overly indulgent and failed to teach their children responsibility. In school, the "social pass" further weakened the sense of consequences and responsibility for performance.
>
> Today the nuclear family has been bombarded and split. Television takes the parenting role from mothers who are no longer content to manage the household, who cannot afford to stay home, or both. Music is all-pervasive. To speak to today's youth one must understand their language.

What should we expect from youngsters who are forming their values during the 70's and 80's? What are the long range effects of political corruption and terrorism, galloping inflation, dwindling resources, genetic engineering, and computer technology? What will today's young people try to tell us? Will we understand?

Conclusion:

Being aware of, and understanding how people deal with differences allows us to form more effective relationships. A need exists for people to realize their responsibilities to themselves and one another. Pull back and look at what people are, and where they were when their values were formed. Massey explains how this nation's attitude and outlook for the future are determined by the values of the existing population. An acceptable balance of these differing views can only be obtained through an understanding of the various groups within our society. What They Are Is Where They Were When . . .

Dr. Morris Massey's Series
"How to Understand Yourself & Others"

LEADER'S GUIDE

What You Are Is Where You Were When

Produced by The Magnetic Video Library 23705 Industrial Park Drive Farmington Hills, MI 48024 (313) 476-1920

Introduction:
WHAT YOU ARE IS WHERE YOU WERE WHEN deals with the subject of human behavior. It is a probing look at how values are acquired, how they affect attitudes, and why people behave as they do.

Do you have a problem relating to your boss? Your co-workers? Your parents, or the younger generation? Why is it that interactions and communication can be so difficult? According to Dr. Morris Massey, the answer is "what you are is where you were when." We're all different because . . . what we are today . . . is directly related to . . . the individual factors that influenced us as we were growing up.

Purpose:
This 90 minute video presentation is the result of lectures and speeches Dr. Massey has delivered to hundreds of management development seminars, civic organizations, and continuing education courses. It will help you develop a clear understanding of your era, family, friends and co-workers. Learning why other people are "different" from you will help you improve your business, social, and personal relationships.

Preparing Your Audience:
Your audience may already have heard of the "Massey Tapes." Dr. Massey's dynamic delivery "tells it like it is" in the no-holds-barred language of today. Introducing the program properly is essential so your viewers will get the maximum benefit from it.

Before watching the videocassettes or film, we suggest you ask your audience to think about their reactions to the following statements:

- "If it feels good, do it," should be everyone's philosophy of life.
- There is too much violence and sex on TV.
- Former President Gerald Ford was right in granting amnesty to Vietnam draft deserters.
- Live for today, forget about saving for a rainy day.
- Long-haired gas station attendants bother me.
- An honest day's work for an honest day's pay.
- We should strive to bring back the "good old days."

Regardless of how you judged these statements, you are 100% right. The surprising thing is that people with completely opposite opinions are also right. Each of us reacted based upon the values "programmed" into us when we were growing up. Dr. Massey analyzes and compares those factors affecting the value sets of each generation.

Audience Participation:
Dr. Massey has developed several "games" to help people clarify their values. These are described in his book, The People Puzzle, on pages 280 through 283. Your audience may benefit from participating in these exercises either before or after viewing the presentation.

Opening Credits:
As the program begins, you'll notice there is no sound. The 30 seconds of written information is designed to make your audience concentrate on what they are about to see. It's displayed at an extremely fast rate. This offers a speed reading challenge to many people, and has a tendency to prepare them for the pace to follow.

Intermission:
WHAT YOU ARE IS WHERE YOU WERE WHEN is most effective if watched from beginning to end with a single brief intermission at the close of Part One.

Conclusion:
Anyone, in all age groups and walks of life, will benefit from this presentation. WHAT YOU ARE IS WHERE YOU WERE WHEN is designed to make us aware of the world we live in and the values we place on people and things. Dr. Massey successfully illustrates ideas and feelings with examples we all understand and relate to on a personal level. If you need to improve communication, motivation, or cope with change, you have found an excellent place to begin.

Professional Development

On 1 February 1980, change 1 to AR 600-76 became effective. Paragraph 4b (2) (b) (3) of this change requires that a short, written narrative critique of any training activity attended under the provisions of AR 600-76 be submitted to OECS within ten days after completion of training. These reports have begun to arrive and in order to share individual perceptions of professional development events, we will publish a few reports in each Communique. We welcome any comments you may have on this feature. For example, if you disagree with the reviewer's rating of the professional development event, let's hear from you and your account can be published in a following issue.

The intent is to share information about professional development events so that you can make the best choice, both for you and for your command, when funds are spent for your professional development.

The following reports are being published in this issue:

a. "Getting the Job Done As Well - Or Better - With Limited Resources." Presented by Organizational Revewal, Inc. (ORI) - Northwest. Report prepared by SGM J. Paquette, OENCO, Fort Lewis, WA.

b. "Situational Leadership." Presented by Dr. Paul Hersey. Report prepared by CPT William L. Frayne, OESO, Fort Polk, LA.

c. "Advanced Situational Leadership." Presented by Dr. Paul Hersey, Dr. Ken Blanchard, et al. Report prepared by CPT Karl K. Hamilton, OESO, Fort Lewis, WA.

d. "OD '80 - New York." Presented by University Associates. Report prepared by CPT James R. Bishop, OESO, Fort Bliss,Tx.

Obviously because of space limitations, we can't print all the reports, but if you need information concerning professional development activities, write or call LTC Bruce Bradford, OECS, ATTN: ATXW-RMA-TD, Fort Ord, CA 93941, autovon 929-6014/6019. With your help and support, professional development can become a more meaningful and effective experience.

In addition to the reports required by AT 600-76, periodically, we will publish more detailed accounts of professional development experiences which may be of interest. Included in this issue are: a report of OD '80 - San Diego by CPTs Tom and Marsha Hawks, a report on Strategic Planning by MAJ Nate Kniker, and a report on Neurolinguistic Programming by LTC Bill Fisher. Your comments on these articles and your ideas for this section are invited.

The opinions and conclusions expressed in these reports are the view of the author and do not necessarily reflect official policy or thinking nor does it constitute endorsement by any agency of the US Army or Commander, USAOECS.

Professional Development

CPT KARL K. HAMILTON
OESO
FT. LEWIS, WA

1. Following After Action Report is submitted IAW, Para 4-5b, AR 600-76.

(a) Course Title - "Advanced Situational Leadership Skills"

(b) Presenting Organization - University Associates, Inc.

(c) Principal Instructor(s) - Dr. Paul Hersey, Dr. Kenneth Blanchard, Dr. Joseph Keilty and Dr. Marshall Goldsmith.

(d) Cost (exclusive of travel and per diem) - $699.00

(e) Location - California American University, Escondido, CA

(f) Synopsis of Course Content - The course covered the following topics: Contracting for Leadership Style, One-to-One O.D. (OE), Interaction Influence Analysis, Mixro-Lab Experiential Approaches, Research and Statistical Design for Situational Leadership, Impact of Situational Leadership on Managerial Effectiveness, Performance Evaluation and Coaching, Roles and Behaviors in Groups and Use of Situational Leadership, Psychological Mapping; Methodology for Increasing One-to-One Communication Effectiveness.

(g) Applicability of Material to Participant's Organization - The material presented has some applicability to the US Army's OE Program in that all Army leadership is somewhat situational. However, even bearing this in mind, the bulk of the material presented was geared toward a civilian climate and did not take into account the traditional role of the military its leaders nor the climate those leaders must operate within.

(h) Potential Value for Other Army Participants - As a vehicle for instructing personnel in the finer points concerning utilization of Situational Leadership, this seminar is adequate at best. However, its use as a teaching/learning vehicle for other Army participants would be extremely limited - really only those individuals with at least a basic, practical working knowledge of the Hersey-Blanchard Situational Leadership Model would be able to utilize this seminar.

2. Recommend that an understanding between California American University, via University Associates, Inc., and the US Army be contracted concerning attendance of Army participants. The understanding should state that graduates of the USA OESOC be exempt from the mandatory prerequisite of attendance at the basic, three day Hersey-Blanchard Situational Leadership Program. Individuals this author conversed with at the seminar felt that this "Advanced" seminar did not fully nor adequately cover all the the topics it was supposed to, and that too much seminar time was utilized as "filler time" by the use of video tapes and/or small group discussions of those same video tapes. This author also felt the same way.

3. I feel that due to the above, this office should seriously reconsider all sides of a discussion concerning future use of this seminar as a vehicle for "Professional Development."

CPT WILLIAM L. FRAYNE'
ASST G1, OESO
FT. POLK, LA

1. IAW change 1, AR 600-76, dated 1 January 1980, Subject: Organizational Effectiveness (OE) Activities and Training, the following information is submitted.

2. CPT William L. Frayne and MSG Billy R. Coleman, Organizational Effectiveness Staff Officer and Organizational Effectiveness Non-Commissioned Officer for Headquarters, U.S.A. 5th Infantry Division (Mech) and Fort Polk attended a professional development workshop on 6-8 February 1980.

a. Course: Situational Leadership

b. Sponsored: University Associates

c. Principal Instructor: Dr. Paul Hersey

d. Cost: $495.00 per individual

e. Location: Central American University, Escondido, CA

f. Synopsis: The Situational Leadership Workshop was a substantial addition to the subject material covered by the

OECS faculty. The workshop lasted two and a half days. The first day covers the basic Situational Leadership theory, maturity scale and the theory behind Lead Self-Lead Other Instruments. The second day and a half deals in depth with the situational use of power and the power bases necessary to influence people at various maturity levels. An interesting utilization of video assets involves an analysis of the motion picture "Twelve O'Clock High" in relation to the Situational Leadership Theory. Main characters within the film are scored for their effectiveness as leaders and observed for employment of the four leadership quadrants under the Situational Leadership Theory. Utilizing Maslow's hierarchy of needs, a group member needs analysis of a combat unit is assessed. I found this highly pertinent to me as an OESO. Throughout the course, instrumentation was heavily emphasized with Lead Self, Lead Other, Power Perception Profile, Maturity Style Match, Self, and Maturity Style Match, Other, administered to participants.

g. Applicability: This material is particularly relevant to this organization as it will allow the revision of Situational Leadership theory within the Leadership and Management Development Course (L&MDC). Updating the L&MDC to include utilization of power bases will significantly improve the implementation of this theory by the L&MCD students.

h. Recommendation: The workshop is highly recommended for any OESO/OENCO. Dr. Paul Hersey functions as the sole instructor for the entire course. The opportunity to study under Dr. Hersey is unique.

SGM J. PAQUETTE
OENCO
FT. LEWIS, WA

1. Following after-action report submitted IAW para 4-5b, AR 600-76.

a. Course title: Workshop -- Getting The Job Done As Well - Or Better - With Limited Resources, 28 March 1980.

b. Presenting Organization: Organizational Renewal, Inc. (ORI) - Northwest.

c. Principal Instructor: Dr. Ronald Lippitt, Vice-President for Professional Development, ORI.

d. Cost (exclusive of travel and per diem): $85.00.

e. Location: Latitude 47 Restaurant, Seattle, WA.

f. Conference Synopsis: A work session during which the following areas were briefed, then explored by the participants:

How to identify unused human resources; getting involvement in "cutback" requirements; utilizing resistance to change as a positive resource; ad hoc task forces as a key to limited resource management; celebrating achievement of limited objectives; coping with increased service demands and new restrictions; and recruiting and turning on volunteer energy. Workshop concluded with application of the above to design individual applications to selected participants' real situations.

g. Applicability of material to participant's organization: The basic data, and the way in which it was presented, were beneficial and can be applied with expected success in varying degrees to several of the undersigned's client systems but introduced very little of direct relevance to the remainder. Due to the workshop format, the quality of about half of the session was contingent on the level of expertise and participation of all participants. In my opinion, this portion contributed little more than an opportunity for concentrated interchange with OD and training people in industry. The main fault I find is that few, if any, civilian practioners have the formal OD-related background that OESO's possess. The opportunity for interchange with some who were highly skilled in limited areas was beneficial but there is no guarantee that all sessions of this type would make those people available.

h. Potential Value for other Army Participants: This workshop had considerable value but of a very limited nature. The value and usefulness was limited to an opportunity to gain new concepts and to be brought up to date on OD theory and practice. However, selective review of current literature could, for the same price, provide considerably more insight. The opportunity to interact with civilian practitioners was of limited value in this case.

2. Any continued OE representation at sessions of this type should be contingent on he quality of the other participants, if this can be determined in advance. In my opinion the session had sufficient value to adopt as an integral part of some workshops planned with clients in the near future.

CPT JAMES R. BISHOP
OESO
FT. BLISS, TX

1. The following after action report is submitted as required, and in accordance with change 1, to AR 600-76.

2. The following information is submitted for your review:

a. Course Title: OD '80.

b. Presenting Organization: University Associates, coordinated by Dr. Warner Burke and Dr. Leonard D. Goodstein.

c. Principal Instructors: Warner Burke, Leonard Goldstein, John Jones, Paul Hersey, Reuben Harris, Eileen Morley, Howard Carlson, Thomas Lodnal, William Eddy, Linda Moore, Barry Oshry and Nancy Adler.

d. Cost (exclusive of travel and per diem): $300.00.

e. Location: Halloran HOuse, New York, N.Y., March 16-18 1980.

f. Synopsis of course content: The following material was presented during the conference:

*(1) "Turning Barriers into Benefits: Searching for a Consultant's Biases and Their Impact on Relationships with Clients."

*(2) "Autocracies and OD Values."

(3) "Identifying and Developing Executive Talents: The Career-Development Center."

(4) "Cultural Synergy: Management of Cross-Cultural Organizations."

*(5) "One-to-One Organization Development: Improving Communication and Performance Review."

(6) "Providing Management Support in the Automated Office."

*(7) "Managing Integration."

*(8) "A Model of Quality of Work Life (QWL) as a Development Process."

(9) "Quality Control of OD Practioners and Practice."

*(10) "Manager as Victim: Distress as an OD Issue."

(11) "A Revolution in Perspective: Seeing Systems."

*(12) "Involving Managers in OD."

(13) "The ACHIEVE System and the Maturity Style Match Instrument."

g. Comments as to applicability of material to participant's organization: - All sessions attended (as indicated by an asterisk in para f above) were definitely applicable to Army organizations. - The "Managing Integration" session provided ideas and concepts for integration of ethnic groups and women into organizations. It is obvious that this is appropriate with the ever increasing number of minorities and women into the Army.

Analysis Model" which is utilized during the performance review/coaching session. This writer believes that the material presented during this session could be effectively utilized in the military setting.

h. The potential value for other Army participants is indeed high. The professional development funds utilized for this conference were well invested. Some of the more valuable aspects of attending this type conference are listed below:

(1) The opportunity to communicate "face-to-face" with leaders in the field of OD.

(2) Gaining valuable "cutting-edge" technology (State of the Art) from these leaders.

(3) Reaffirming established theories and practices in OD/OE.

(4) Introduction of new or modified theories and practices in OD/OE.

(5) Rejuvenation or rekindling of interest/desire in continued development of skills through professional development and self-study.

3. In summary, this conference was refreshing and enlightening. If any clarification of material contained herein is required, contact CPT James R. Bishop. CPT Bishop can be reached at AUTOVON 978-4425/7501 or by writing to Human Resources Division, ATZC-PAHOE, Fort Bliss, Texas, 79916.

Strategic Planning

MAJ Nathan Kniker
USAOECS
Fort Ord, CA

Major Nathan H. Kniker is currently assigned to the Consulting Skills Division of the Training Directorate at USAOECS. A 1965 graduate of West Point, he graduated from USAOECS in December, 1975. He holds a MAPA from Northern Illinois University. Major Kniker last served as an OESO in the 25th Infantry Division, Hawaii.

The purpose of this article is to inform you of some of the ideas and concepts I have obtained by attending two conferences on strategic planning. I think it best to start by defining a few terms which will be used throughout this article.

- Strategic planning - The process of determining mission, objectives and strategy.
- Strategy - The pattern of objectives, purpose or goals and major policies and plans for achieving these goals, stated in such a way as to define what the purpose of the organization is or is to be and the kind of organization it is or is to be.

Strategic planning is different then from day-to-day operational planning or even producing a long term plan that deals with operational requirements. It is looking at the organization by a few of the major decision-makers in that organization and determining the general direction or what is to be accomplished by the organization and what kind of organization it is going to take to achieve that general direction. One thing that is clear, is that the strategic planning process does not involve a large number of people, generally 4-7, and it must include the commander or head manager of the organization. It cannot be done by a group of staff officers as an action for the major decision-makers of the unit. A staff officer may be given the job of planning coordinator, but it must be clearly understood that this person is not responsible for producing the strategic plan.

The question is then what defines a strategic problem; how can you tell that the problem faced is of strategic importance to the organization? Professor Dale Zand of NYU has developed a list of well-structured vs. ill-structured problems. The ill-structured problems are those that are strategic decisions. This list is produced below.

This list is offered to help distinguish between the "routine" and the "non-routine", the "clean" and the "messy", the "operational" and the "strategic" types of problems. The point is that for strategic decisions, the information base is almost always what Zand calls an "ill-structured problem".

Problems elements	Well-structured Problems	Ill-structured Problems
Nature of the information	Relatively complete Relatively certain	Incomplete Uncertain
Nature of the goals	Few, clear and relatively independent of each other	Many, unclear, & quite independent with each other
Causes of the problem	Relatively clear, known, independent of each other	Unknown and/or unclear & interdependent
Solutions to the problem	Specific and singular	Unspecific and/or multiple and often equally attractive
Feedback on whether problem is solved	Short-time, relatively clear and complete	Ambiguous in many ways... can't tell if you've solved it or not
Experts and expertise that will help deal with problem	Identifiable and available with relatively unambiguous credentials	Unknown and/or unavailable; many competing claimants.

Dr. Peter Vail has also developed a listing that would help to determine when a decision is of strategic importance.

1. When it involves what feels to the decision-maker like the commitment of an unusually large proportion of resources.

2. When losses will be "serious" if the decision is incorrect.

3. When a decision will involve change in behavior of large numbers of people; and/or when "key" people must make a big change.

4. When the choice runs counter to what other similar organizations have done under similar circumstances.

5. Where the choice requires operation of new technologies with which the organization has little experience.

6. Where the choice closes off other options which could in the future be desirable.

7. Where the choice involves "long cycle feedback" - it will not be known for perhaps years if the intended benefits are occurring.

8. Where key members of the system are quite divided over the wisdom of the choice.

9. Where implementation of the choice will result in dramatic changes in the daily operations of the system - the people involved, the pace at which things move, the number of new operating policies and procedures that will have to be devised, etc.

10. Where past attempts to deal with the same issue "routinely" have not worked.

These, then, are some of the ways that can help you when working with an organization in determining whether they face operational choices or strategic choices.

There are a couple of ways of looking at the strategic planning process. The first is like a flow diagram. It involves:

(1) Identify core mission/purpose.

(2) Deduce objectives

(2) Develop trends for the future.

(3) Combine trends into scenarios about what the future will be like.

(4) Develop strategies to reach objectives

(5) Choose most likely scenarios (most neglected process in strategic planning).

(6) Select strategy most appropriate for most likely scenario.

In a matrix, step six would look like:

SCENARIOS OF THE FUTURE ENVIRONMENT

ALTERNATIVE STRATEGIES	A	B	C	D
1				
2			X	
3				

Choice: We will follow strategy 2 because we think we will be living in a "C" environment.

This also gives the commander the opportunity to look at some time in the future to see if the assumptions made were correct and whether a "C" environment is present and if strategy 2 is still appropriate. A second way to look at the process is to ask a series of questions:

1. Where are you now?

2. Where do you want to go?

3. How do you want to travel?

4. When do you want to arrive?

5. Who is going to drive?

6. How much will you pay?

These questions will get you on the way to strategic planning and help in doing the environmental scan which is a part of strategic planning.

I want to finish by discussing the two conferences I attended. The NTL schedules a conference entitled "Strategic Planning: A New Focus for Organization Development." The leader is Dr. Peter Vail. The focus is to look at the strategic planning process and how as a consultant to intervene in that process in organizations. From the standpoint of consulting, it was beneficial to me, and I would recommend it as a starting point for an OESO interested in strategic planning. The second conference I attended was scheduled by AMA entitled "Strategic PLanning." The leader of this course varies with location. Its focus is to teach businessmen how to implement a strategic planning process in a business. It is almost all business-oriented. Had I not had previous experience in strategic planning, I would have had extreme difficulty translating what was presented to consulting. It was useful, but all business-oriented.

In anything I do involving planning, I always try to remember two things:

1. The present is determined by the future - not the past.

2. Planning has little relevance to organizations seeking only to project their present performance into the future.

OD '80

CPT (P) Thomas R. Hawks
CPT Marsha E. Hawks
USAOECS
Fort Ord, CA

■ *CPT (P) Thomas Hawks was commissioned thru OCS and served with the Special Forces and 101st Airborne Division in Vietnam as an infantry officer. For the last 8 years, he has been with the Medical Service Corps. Since 1975, he has been assigned in the area of Combat/Concepts Development, first in personal issues and presently in the field of OE. He possesses a BS (Psychology/Biology), a Masters (Community Development and Health Systems Design) and has been selected by the Army Medical Department to return full time to complete his PhD.*

■ *CPT Marsha Hawks received a direct commission in the Medical Service Corps in 1972. CPT Hawks holds a BA in English and MSW in Psychiatric Social Work.*

University associates recently concluded its Western version of OD 80 in San Diego (19 -- 21 March). Billed as "A Conference on Current Theory and Practice in Organization Development" it afforded the authors, as well as 15 other members of the Army's OE effort, an opportunity to determine how our program measures up to those of our civilian counterparts.

We have chose to present our review of the conference in two distinctly different thrusts. First, we will provide a listing of the concurrent sessions and a brief synopsis of each. Second, a summary of our perceptions of the conference from the standpoint of its relevance to Army OE as it exists now, and how it will exist in the future will conclude the article.

CONCURRENT SESSIONS

1. One-To-One Organizational Development: Improving Communication and Performance Review - Paul Hersey

The presentation examined the procedures and practices in the application of situational leadership in an organizational setting. Specifically, attention was focused on strategies to improve communications and increase the potential for conducting effective and successful performance review and coaching sessions. The models and techniques were based on the Hersey-Blanchard Situational Leadership Model.

2. Personal Power and Influence in Organization Development - Roger Harrison

Dr. Harrison provided participants a framework for considering the professional and personal issues around power and influence which arise for OD practioners rather than a set of conclusions. Part of the problem, according to Harrison, is probably the tendency for us to limit our implicit understanding of the word "power" in a way that makes the concept negative, causes us to experience guilt and discomfort over our own personal needs and motives, and weakens us in dealing with strong clients and tough organizational issues.

3. Cultural Synergy: Management of Cross Cultural Organizations - Nanch Adler

The seminar presented an approach to cross cultural management (the management of cross cultural interaction) utilizing a model developed by Nancy Adler. Briefly, it is a process whereby organizational policies are based on, but not limited to, the national cultural patterns of an organization's members and clients. Culturally synergistic organizations create or "enact" new forms of management; they transcend the individual national cultures of their members. The Cultural Synergy Model recognized both the similarities and the differences between the two or more nationalities that compose the international organization. The model suggests that cultural diversity neither be ignored nor minimized, but rather viewed as a resource in the design and development of organizations.

The possible implications and applications this model may have within the Army are limitless. A follow-up article, presenting Adler's model in more detail plus a prototype OD design for its application in a cross cultural military setting will be presented in the next Communique by the authors (Hawks and Hawks).

4. Identifying and Developing Executive Talents: The Career Development Center - Leonard Goodstein

Dr. Goodstein presented assessment center technology which addressed one of the perennial issues surrounding such agencies; development or selection. The traditional assessment center with its focus on selection poses problems for comprehensive humanistically oriented HRD programs. Typically, the assessment center analysis "belongs" to management. It is written all too often in the technical language of the professional psychologist, and it has limited usefulness as a management-development or organization-development tool. There are also a number of practical limitations. The typical selection oriented assessment center is time consuming, often requiring almost a week of the participant's time and even more time from the professional assessment staff. The center is thus expensive to operate and requires intensive use of highly paid professionals.

The major concern of Dr. Goodstein's work has been to transform this additional assessment center technology into a management-development tool--one in which the analysis or product of the assessment center belongs to the individual participant and one that impacts both the participant's self-understanding and plans for the future. Such a technology would be more cost effective and have other salutary side effects on the system using the transformed technology.

5. Values and the Bottom Line in OD - Larry Greiner

The session examined the ways values have changed over the years in OD's evolution, the ways they are reflected in the role behavior of change agents, and what these different roles are. The "Bottom Line" was discussed, not just in terms of profits, one version of it, but also as a value concept for the change agent, since it makes a difference in what he or she stresses (e.g., values for relating to each other).

6. Towards a Technology of Macro-Systems Interventions - Reuben Harris

Dr. Harris provided attendees an opportunity to become aware of trends and developments in OD's effort to address macro-systems. Discussions centered around:

a. Observations on the nature of organization world:

(1) Uncertainty about the future requires Contingency Planning.

(2) Organizations must give simultaneous attention to social, technological, and economic conditions.

(3) Need to modify patterns of problem definition and resolution strategy.

(4) Need more sophisticated models and conceptualizations of change.

(5) Need to modify managerial orientations towards and need for control.

(6) Need for more macro-system interventions (Definition - a series of planned action steps targeted on main system elements (structure, rewards, system, etc.) with the goal of reconfiguring those elements to make them more compatible and supportive towards improving organizational effectiveness.)

b. Assessing organizational readiness for significant system change - nine dimensions:

(1) Appreciation and understanding of interrelationships among systems dimensions:

(2) Appreciation that change situation has some unique anxiety producing characteristics.

(3) Willingness to specify a detailed vision of the future.

(4) Willingness to act under uncertainty.

(5) Willingness to develop contingency plans.

(6) Willingness to follow contingency plans.

(7) Willingness to examine and test one's personal theory.

(8) Increased dissatisfaction with the organization's present status.

(9) Non-authority basis of power and influence.

c. Recent discoveries:

(1) Organizational readiness is a critical issue.

(2) Change orientations towards control and uncertainty is difficult.

(3) Change dynamics are misunderstood.

(4) Many managers, especially top leaders, don't understand their organizations.

(5) Macro-systems interventions are underutilized in OD.

d. Three things to focus on:

(1) Conceptualizing change:

(a) Targets for change - macro vs micro.

(b) Model for change process.

(c) Understanding change dynamics.

(2) Acceptance of uncertainty:

(a) Anticipating change dynamics.

(b) Developing contingency plans.

(c) Monitoring change.

(3) Managing change: Developing change management capability and readiness.

e. Requirements for effective change management:

(1) There is a need to see "certainty and stability" as goals.

(a) Energy, especially negative energy, needs to be redirected

(b) Proactive and guidance giving leadership are needed.

(c) Conflict management is a priority concern.

(3) Very high demands on communications and information systems: Role responsibilities, performance feedback, and reward systems.

(4) Change manager needs to be trusted and perceived as competent.

7. Quality Control of OD Practitioners and Practice - John Jones

Dr. Jones addressed concerns about the control of the quality of work performed by people who are hired to engage in OD projects. Attention was given to quality considerations in various stages of hiring and using OD practioners and in various attempts to improve the practice.

8. Managing Integration - Eileen Morley

Based on the reality that the movement of women and minority people into work organization is one of the most extensive changes occurring. Eileen Morley's presentation considered three aspects:

a. The dynamics of integration - the phases of resistance, isolation, assimilation, and acculturation that are predictable in any situation in which a stranger approaches an ingroup.

b. Ways to cope with the stress of being a stranger - ways in which the stranger copes with the experience of being rejected, isolated, discounted, or accepted on the condition that he or she behaves exactly like an ingroup member.

c. Integration management - the implications of these processes for any person who manages a group or department in which such dynamics are likely to occur and who needs to identify and manage them effectively.

9. A Model of Quality of Work Life (QWL) as a Development Process - Howard C. Carlson

The seminar presented a model of QWL as a dynamic, simultaneous developmental process for individuals and organizations in transition. The QWL transition state is viewed as a process that, in and of itself, involves three levels of development:

a. Building blocks stage - the development of individuals and groups.

b. Bridging stage - the development of organic structures and mechanisms reaching from individuals across groups top new potentials for the organization.

c. Becoming stages - the never ending development of organizations and society.

During each of the different stages QWL activities are assumed to provide simultaneously unique and cumulative developmental experiences for the organization and its members. At any one stage, principles found basic to successful applications of the QWL approach must "flow forward" to be incorporated in new experiences and higher state of development for the organization. Similarly, it is essential to provide for "flow back" of information to be incorporated in a higher state of development for the individual.

10. Involving Managers in OD - Warner Burke

Dr. Burke states that for a consultant's intervention to be considered organizational development (OD) it must:

a. Respond to an actual felt need on the part of the client.

b. Involve the client in planning and implementing the intervention.

c. Lead to change in the organization's culture.

The seminar addressed the second criterion listed above. It considered the involvement process from both the client's and consultant's perspectives and emphasized three aspects of involvement: (1) Commonality of values between the client and consultant, (2) Short-range versus long-range involvement, and (3) The political side of the process.

11. Management Development and Organization Development: Twin Cornerstones of Human Resource Management - Patrick Williams

The seminar considered the possibilities inherent is an integrated approach from a vantage point of adapting and implementing innovative elements of existing human resource development (HRD) programs into a composite "ideal" strategy. Second, the ways that this integrated approach may be adapted to the needs of a specific organization were examined using examples of Dr. William's own experience and the considerable literature available. Finally, it focused specifically on the ways that MD and OD may best support each other within the organization's overall HR strategy.

12. Manager as Victim: Distress as an OD Issue - William B. Eddy and Linda Moore

The workshop began with an introduction to the topic of stress, its sources, impacts, and physiological consequences. Then a diagnostic instrument developed by the seminar leaders was utilized to help participants identify stressors in their work environment from several sources such as systemic factors, subordinates, superiors, cultural pressures, internal messages, etc. Group and individual analysis and problem solving followed the diagnosis, and participants were helped to devise strategies for reducing or eliminating stressors. The underlying point of view is that stress in work is an organizational phenomenon. The organization, not the individual, should be the initial target of change.

13. The ACHIEVE System and the Maturity Style Match Instrument - Paul Hersey

The ACHIEVE System has two primary goals: (1) To isolate the key factors that can influence subordinate performance and (2) To arrange these factors in a way that could be easily used and remembered by managers. The first stage in the development of the process involves a review of the relevant literature on performance and a choice of key performance factors. The second stage involved the combination and explanation of these factors in a way that could be easily and quickly taught to line managers.

The ACHIEVE system can be used to analyze any performance situation. The model can be used three ways: for performance planning, coaching, and performance review.

The Maturity Style Match is useful for pointing out two common management problems: Underleadership and Overleadership.

SUMMARY/CONCLUSION

If the material presented at OD 80 is indicative of OD's state-of-the-art, where does Army OE stand in relation? A consensus of Army personnel in attendance seemed to support the following statement of condition:

a. Many of our interventions/operations are regularly addressing issues and attempting to affect change in complex organizations utilizing technologies beyond, for the most part, those represented by the conference agenda. This is not to say that there were not significant learnings available to OE personnel (notably material presented by Nancy Adler, Cross Cultural Synergy Model, and Reuben Harris - Considerations for MACRO Interventions). However, OE, as documented throughout the Army, consistently demonstrates a vitality and willingness to attempt innovative and experimental interventions in a manner to be envied by our civilian counterparts. Perhaps the time has come for us to provide a forum for the provision of our learning to others. We could begin with our colleagues who are practicing OD within the Department of Defense and expand the effort across government lines into the private sector. The OD community would profit as a whole.

b. University Associates, sponsor of OD 80, has served as a training ground for many OESOs. The programs and materials offered by UA are superb and practically without peer when utilized in the development and conduct of process consulting operations. However, our experience in large system change involving systemic adjustments beyond the "people" sphere points out the need for additional skills and knowledges. Some of these needed skills are: Organizational design, organizational start-up, and strategies for the introduction of advanced technology. Process consulting remains the basic tool. The ability of a consultant to wield any of these skills will always be dependent upon foundations forged from process skills. US and conferences such as OD 80 have the ability to develop process skills, however, skills of a more pragmatic nature are available elsewhere.

Neuro-Linguistic Programming

LTC William R. Fisher
USAOECS
Fort Ord, CA

LTC William R. Fisher is Director of Training at the Organizational Effectiveness Center and School, Fort Ord, California. He has commanded numerous aviation units and held several management and teaching positions in the Army. He holds a M.S. Degree and is completing certification as a NLP instructor.

INTRODUCTION

Neuro-Linguistic Programming (NLP) is a behavioral communications model and a set of procedures to improve communication skills. NLP was developed by Richard Bandler and John Grinder, co-authors of the Structure of Magic, Vols. I & II. Bandler and Grinder studied the working processes of many noted professionals from widely divergent schools, including such people as Fritz Peris, Gestalt; Virginia Satir, Family Communications; and Milton H. Erickson, M.D., Medical Hypnosis. They extracted and systematized a highly pragmatic and sophisticated model of behavior. The theoretical underpinnings represent an ambitious attempt to codify and apply knowledge from Linguistics (language), Kinesics (body language) and cybernetics (the study of communications systems). In my view, the NLP model offers much to people concerned with improving communication skills and organizational consultants wanting to increase their knowledge in the art of establishing rapport and influencing behavioral change by gathering information.

The overall NLP model is quite complex and it would be impossible to deal with all of the material in any depth given the boundaries of this article. I will, however, provide the reader with some of the core concepts and communication skills that I have found useful an as instructor, manager and consultant.

THE STRUCTURE

NLP is based on the notion that "the map is not the territory"; that is, we do not operate directly in the world around us but through maps or models filtered by three (3) major constraints.

First, Neurological Constraints. Our nervous system constitutes the first set of filters which systematically distort and delete portions of our world. The human receptor system includes: sight, hearing, touch, taste and smell.

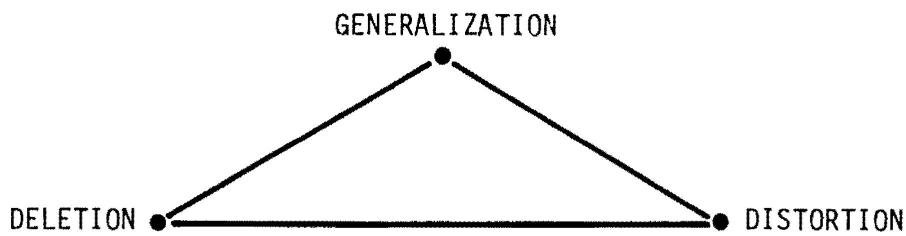
Second, Social Constraints. Language is one of the most commonly recognized social genetic filters. Language is used to organize our experience and serve as our representation of the world. However, if a particular language system is not clear our experiences will be dramatically different. For example, the word blue may mean many things in English and by itself can greatly mislead the listener.

The third set of constraints, Individual Constraints, is the last and most far-reaching in filtering experience and perception. Bandler and Grinder view individual constraints in the following way. "Individual constraints refer to all the representations we create as human beings based upon our unique personal history. Every human being has a set of experiences which constitute his or her own personal history and are as unique as fingerprints. Therefore these differences in our experiences will guarantee that each of us has a model of the world which in some way will be different from any other person's model of the world."[1] This concept of filters sets the stage of understanding human behavior and effective interpersonal communications.

Anyone who wants to improve his or her interpersonal skills must recognize these profound differences and the way a commander, co-worker or mate alter experiences which either enrich or impoverish their world. Knowing that people block themselves by not understanding or becoming aware of experiences of others by listening and seeing that perception is an active process greatly limits their options and effectiveness in building rapport.

THE META MODEL

Understanding that individuals communicate from constraints, the next step is to use a model that can assist in visualizing three universal human modeling processes: See figure 1.



The Meta Model

Figure 1.

Cameron-Bandler states that "The Meta-Model" is designed to "teach the listener how to hear and respond to the form of the speaker's communication. The content may vary infinitely, but the form of the information given allows the listener the opportunity to respond in such a way as to obtain the fullest meaning from the communication. With the meta-model it is possible to quickly discern the richness and the limits of the information given as well as the human modeling processes used by the speaker."[2] In addition to achieving depth to a conversation it is also useful to gather information by helping the speaker become aware of his language, thereby improving the quality of information. By way of an example, the three general mechanisms are generalization, deletion, and distortion.

First, generalization is essential to coping with the world. Generalizations can either limit or enrich our experience. For example, if a commander has had a poor OE intervention he may generalize that all OESOs are ineffective and that OE is not helpful. It is helpful then to explore the context of this mechanism and lead him to other possibilities.

Second, deletion is a process by which we selectively pay attention to certain dimensions of our experience and exclude others. For example, you can as a teacher focus on your lecture to such an extent that you may not notice that everyone has left the classroom. Reduction of data (deletion) is important when we need to reduce information to a level which we feel capable of handling, but it may not be useful if we are gathering data for our client. For me, this highlights the need to use both content and process information to obtain data in order not to delete important information.

The third process is distortion. Distortion allows us to make shifts in our experience of sensory data. Most conversations are distorted. Fantasy is a form of distortion which allows us to distort our reality. Distortion can keep you from seeing what is being correctly presented.

In review, the meta-model is a way to expand and enrich the information provided by a speaker, by offering a structure to the language. Asking "what" and "whom" questions to lead the speaker to specifics can be a powerful approach to improving communications. The following examples illustrate the meta-model in language format.

(Generalization) - "No one wants an OESO."
(response) - "Who, specifically, doesn't want one?"

(Deletion) - "He's the best."
(response) - "He's the best what?"

(Distortion) - "I'm confused." "He gave me no relief."
(response) - "What confusion?

To utilize the model it is useful to listen to the language presented which will help you in gathering information, noting the limits of the language used by the speaker and organizing data that is appropriate to the speaker's world.

TECHNIQUES

Representational system. One of the basic stipulations of the communication skills models is that all on-going experience must consist of some combination of each of our representation systems. The five perceptual modes are: (1) vision (sight), (2) audition (hearing), (3) olfaction (smell). (4) gestation (taste) and (5) kinesthesis (body sensations) which can be tactile or visceral. In NLP each sensory system or representational system is considered to do more than simply receive and represent information. Matching systems is a way to building rapport and learning which system the speaker is using. An interesting technique, then, is to communicate in the same system and determine various strategies for successful interactions.

For example, as a listener, you can discern what portion of experience a person is representing consciously by attending to the process words used. Such words usually specify a process of seeing, hearing, feelings, and smelling or tasting. The following are some examples of such process words:

Visual (V)	Auditory (A)	Kinesthetic (K)	Smells, Tastes (S,T)
picture	scream	feel	bitter
vague	hear	warm	salty
bright	screech	touch	fragrant
flash	shout	handle	pungent
blue	loud	grasp	smells
see	amplify	soft	stale
focus	tune	tight	fresh
perspective	tone	smooth	taste
clear	harmonize	rough	sweet

Process words that do not indicate any of these four parameters of experience are unspecified. That is, they are unspecified as to just how the process is being represented or executed--whether in pictures, smells, feelings or sounds. Some examples of unspecified predicates are:

think	learn	change	consider
know	nice	respectful	remember
understand	intuit	trusting	believe

Understanding the process words (verbs) you can then place this information in verbal and non-verbal communication context. The influence of the strategies that we use to guide our behavior effects all aspects of our communication with others. Consider, for example, the following ways that language can be used in various representational systems.

Bandler and Grinder have pointed out that the words that an individual uses to describe his/her experience will be an accurate transformation of the way that experience is represented to the individual. An individual that tends to use a preponderance of visual words will probably be more aware of the visual aspects of his/her experience.

1. Visual: I see what you are saying; That looks good; That idea isn't clear; I'm hazy about that; I went blank; Let's cast some light on the subject; Get a new perspective; I view it this way; looking back on it now; An (enlightening, insightful, colorful) example.

2. Kinesthetic: If it feels right, do it; Get a handle on it; Grasp the concepts; Get in touch with yourself; A solid understanding; I'm up against a wall; Change your standpoint; You're so insensitive; I have a feeling you're right.

3. Auditory: I hear you; That rings a bell; It sounds good to me; Everything just suddenly clicked; Listen to yourself: That idea's been rattling around in my head; Something tells me to be careful, I can really tune to what you're saying.

The Language in each of the three groupings specifies representational system to be used in making sense of the communication. Time and time again I have observed situations in which there is a breakdown of communication between people involved in team building, conflict resolution, interviewing and couseling when representational systems are not matched. A commander said to an OESO, "I really feel like my officers have me over a barrel and they are not sensitive to the feelings of the men." The OESO responded, "I hear you saying that you can't picture what's going on!" Because they are referring to different systems, the two end up talking right past each other. Another example is when a commander states, "I can't see what you are saying" the OESO responded, "How do you feel about that?" There are times to use "feeling" words, but only if the person is in the kinesthetic representational system. Accordingly, here at the school, I have added the following model to match representational systems with possible marketing techniques using NLP concepts.

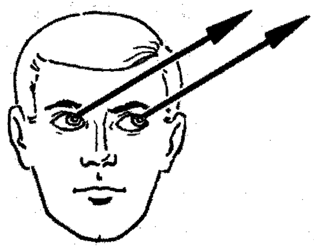
Client System	OESO System Match	Marketing Technique
Auditory	I hear you? (Tune in)	Talk about program
Kinesthetic	What are your feelings? (Get in touch)	Talk about feelings about program.
Visual	How it might look. (Focus in on it)	Show a picture of program by Vugraphs, butcher paper, etc.
Smell	This unit stinks. (What does it smell like)	The program will not get stale.
Taste	This is tasteless. (Leaves a bad taste in your mouth)	The program will not go sour on you.

Bandler states that "if you want to get good rapport, you can speak using the same kind of verb that the other person is using. If you want to alienate the other person, you can deliberately mismatch verbs."[3] The next technique concerns non-verbal cues which also carry information about the representational system.

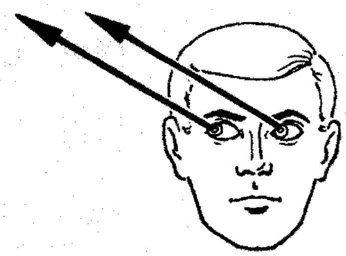
ACCESSING CUES

You may have noticed that during an interaction people will often break eye contact and avert their eyes momentarily as they access some bit of information or answer some question. These eye movements are part of a class of behavior that NLP calls "accessing cues". Generally, individuals will shift their eyes correspondingly to the representational system they are accessing., See figure 2.

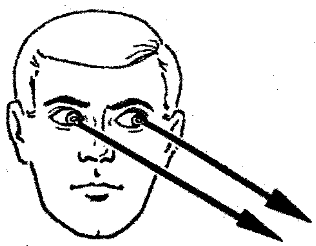
Figure 2



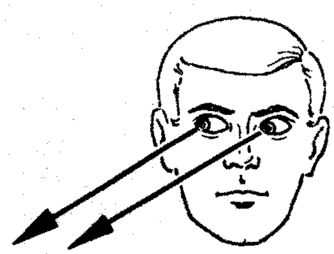
*Eyes up and to the left:
Recalling something seen before--
a visual memory.*



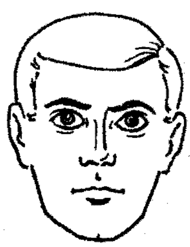
*Eyes up and to the right:
Visualizing something that has
not been seen before.*



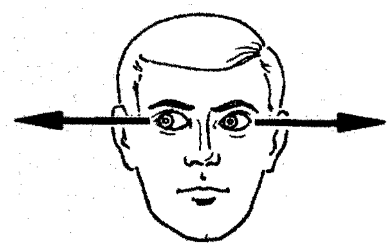
*Eyes down and to the left:
Talking to oneself--an internal
dialogue in the auditory mode.*



*Eyes down and to the right:
Sensing how the body feels--
processing kinesthetic input.*



*Eyes staring into space and not
focused, with some pupil dilation:
Either visual recall or visualizing
something that has never been
seen before.*



*Eyes horizontal, looking right or left:
Making sense of sounds one is hearing
at the moment, recalling sounds from
memory, or imagining sounds--auditory
processing.*

When a person's eyes have shifted up and to the right or left they are accessing internal visual imagery. When a person's eyes move laterally to the right or left or down and to the left, they are accessing internal auditory representations. And when they shift down and to the right they are accessing feelings.

Eye movement patterns are, of course, only one of many communication indicators, but together with Language and non-verbal cues much can be done to improve interpersonal communications and a tremendous amount of information can be gained about processing strategies and building rapport.

<u>PACING AND UTILIZATION</u>

In my view, the concept of pacing as a technique to build rapport is very useful. The following information was provided by Robert Dilts and Terrence McClendon. Dilts states that pacing and utilization is "one of the most effective ways of applying the information you have gathered about representational systems and strategies when you are working with an individual or group is to <u>pace</u> their strategies. Pacing essentially involves incorporating aspects of another's behavior into your own. It is the process of going to their model of the world. A person or group can't respond to their own processes for organizing their experience--it is therefore generally much quicker to work through the processes that they have developed for themselves rather than try to impose your own on them."

"Pacing involves the ability of the consultant to have the flexibility to be able to pick up and incorporate the vocabulary and non-verbal communication of an individual or group, and to be able to translate his or her ideas into that vocabulary. It also involves the ability of the consultant to package his or her information in a form and sequence that is most compatible with the processing strategies of the client. For example, packaging your information in a form most compatible with the decision strategy of an individual could be illustrated like this: A^e (auditory external) V^e (visual external) V^e (visual internal) V^i (kinesthetic internal) DECISION MADE. This might involve a presentation like, "I'm sure you have a lot of questions to ask (A^e) about this project, and as you can see (V^e) I have really looked hard (V^e or V^i) for the answers ...And I believe I can show you (V^e) the solution that I'm sure you will feel (K^i) is the most solid (K^i) way to proceed."

"Because the presentation fits the natural progression of the individual's strategy, it will be much easier for that individual to follow and, because it paces the individual's own decision strategy, it can often become irresistable to the person."

"The process of pacing is very important to all of the essential aspects of good organizational communication, such as rapport and trust building, delivery and presentation, and it will be essential in organizing the kind of interventions that you, as a consultant, may want to make. The information that you have gathered about the strategies of the people you are dealing with is utilized through this process of pacing."

"In team building, for instance, you will want to utilize the information you have gathered about your participant's strategies to engineer the appropriate kind and sequence of interactions that will take place between the task team members."[4]

CONCLUSION

It is hoped that this article has provided you with information on neuro-linguistic programming. At the present time I am completing training in this technology and I have found that the communication techniques discussed are effective. If you are interested in NLP, you can order books on the subjects listed in the reference or attend a workshop presented by NLP. We are also planning to include NLP techniques in the classroom and at the Advance Skills Conference this summer.

In review, the paradigm of NLP is built upon the following presuppositions:

1. The meaning of a communication is the response it elicits, independent of communicators' intentions.

2. Experience is generative by the interactions of internal processes and external stimuli.

3. Observation of language patterns and non-verbal cues can improve communication techniques and,

4. NLP is a practical model and provides precision to interpersonal communications.

Lastly, the techniques discussed in this article are only a few of a large and sophisticated body of concepts advanced by NLP. In no way is this an extensive survey of NLP procedures, but I hope that this will provide you with a foundation to base your future exploration into NLP techniques.

Rosters

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TRAINING AND DOCTRINE COMMAND
ORGANIZATIONAL EFFECTIVENESS CENTER AND SCHOOL
TELEPHONE DIRECTORY

AUTOVON: 929-XXXX   Ø1 MAY 198Ø

TITLE	NAME	PREFERRED	OTHER NUMBERS		
OFFICE OF THE COMMANDER	ATXW-RMA BLDG 2843				
Commander	COL Golden	5919	4882	2606	
Executive Officer					
Command SGM	SGM Hewitt	5919	4882	2606	
Secretary	Ms. Spry	5919	4882	2606	
Human Resources Manager	LTC Bradford	7058	6014	6019	
ARI Liaison Officer	Dr. Otto Kahn	2606	4882	4716	
OPERATIONS AND SUPPORT DIRECTORATE	ATXW-RMA-OS	BLDG 2843			
Director	LTC Sheffield	5919	4882	2606	
Adjutant	1LT Holliday	2775	7297	3549	4716
Operations Officer	MAJ Armour	3549	2775	7297	4716
Operations Clerk	SP5 Suafoa	2775	7297	3549	
Admin Officer	Mr. P. Neumann	3549	2775	7297	4716
Word Processor	Ms. E. Greene	3549	2775	7297	
Word Processor	Ms. J. Moore	3549	2775	7297	
Xerox Machine Operator	Ms. Leon-Guerrero	3549	2775	7297	
Clerk/Steno	Ms. McCarter	5919	4882	2606	
Budget Analyst	Ms. B. Joe	6797	7911		
Supply Technician	Ms. D. Green	7911	6797		
NCOIC	MSG Tufono	2775	3549	7297	4716
Unit Clerk -	SSG Trujillo	2775	3549	7297	4716
Unit Clerk	SP5 R. Smith	2775	7297	3549	
SIDPERS Clerk/Mail Clerk	SP4 Donaldson	2775	7297	3549	
Clerk/Driver	SP4 Paxston	2775	7297	3549	
Maintenance Engineer	Mr. R. Baker	2775	7297	3549	
EVALUATION DIRECTORATE	ATXW-RMA-E BLDG 2822				
Director	MAJ Cooper	4575	4312	6013	
Secretary	Ms. L. Moorehead	4574	4312	6013	
Data Transcriber	Ms. Toler	4574	4312	6013	
NCOIC	SFC(P) Cudger	4574	4312	6013	

TRAINING AND DOCTRINE COMMAND
ORGANIZATIONAL EFFECTIVENESS CENTER AND SCHOOL
TELEPHONE DIRECTORY
AUTOVON: 929-XXXX ∅1 MAY 198∅

TITLE	NAME	PREFERRED	OTHER NUMBERS	
EVALUATION DIRECTORATE (Continued) ATXW-RMA-E BLDG 2822				
Chief Design/ Collection Division		6013	4312	4574
Evaluation Officer	CPT Plourde	4574	4312	6013
Computer Programer	Mr. L. Nolan	4574	4312	6013
Chief Survey & Measure Division		4574	4312	6013
ORSA Officer	CPT Mitchell	4574	4312	6013
TRAINING DIRECTORATE ATXW-RMA-T BLDG 2844				
Director	LTC Fisher	3519	4021	3588
Secretary	Ms. L. Crouch	2889	3588	3519
Librarian	Ms. L. Herrick	7228	6075	
Librarian	Ms. McLaughlin	6075	7228	
Instructional Material Specialist	SP4 Jones	2767	3588	2889
Pre-Command Course Coordinator		3519	4021	
Chief, Individual Skills Division	MAJ Lenz	3519	4021	
Training Officer	Dr. Guido	2889	4021	
Training Officer and Human Resources Manager	Dr. Eppler	3588	2889	
Training Officer	Dr. Milano	2889	4021	
Training Officer	MAJ Hatler	4021	2889	
Training Officer	CPT M. Hawks	3588	4021	
Training Officer	CPT Hopkins	5308	3588	
Training Officer	MAJ Edwards	5308	3588	
Training NCO	SFC Pierre	3588	2889	
Training NCO	SGM Cato	4021	3519	

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TELEPHONE DIRECTORY

AUTOVON: 929-XXXX   Ø1 MAY 198Ø

TITLE	NAME	PREFERRED	OTHER NUMBERS		
TRAINING DIRECTORATE (Continued) ATXW-RMA-T BLDG 2844					
Chief, Consultant Skills Division	Mr. Goodfellow	4021	2889		
Training Officer	LTC Berg	4021	2889		
Training Officer	MAJ Fowler	4021	2889		
Training Officer	MAJ James	3411	4675		
Training Officer	MAJ Smith	3411	4675		
Training Officer and Key Manager Course Coordinator	MAJ Kniker	3519	4021		
Training Officer	Mr. McDuffy	3411	4675		
Training Officer	MAJ Langford	4021	3519		
CONCEPTS DEVELOPMENT ATXW-RMA-CD BLDG 2821					
Director	LTC Pike	7886	7885	7108	7106
Secretary	Ms. M. Voorhees	7886	7885	7108	7106
Chief External Operations Division	LTC Looram	7886	7885	7108	7106
Project Officer	MAJ Rodier	7886	7885	7108	7106
Project Officer	CPT Duke	7886	7885	7108	7106
Project Officer	CPT(P) T. Hawks	7886	7885	7108	7106
Chief, Concepts Division	MAJ Jackson	7886	7885	7108	7106
Project Officer	CPT Price	7886	7885	7108	7106
Project NCO	MSG P. Bartlett	7886	7885	7108	7106
Project NCO	SFC Konarik	7886	7885	7108	7106
Sociologist	Mr. Stanchfield	7886	7885	7108	7106
Chief, Research Division	(Proposed)				
Officer	(Proposed)				
Officer	(Proposed)				
Project Officer	(Proposed)				

TRAINING AND DOCTRINE COMMAND
ORGANIZATIONAL EFFECTIVENESS CENTER AND SCHOOL
TELEPHONE DIRECTORY
AUTOVON: 929-XXXX 01 MAY 1980

TITLE	NAME	PREFERRED	OTHER NUMBERS		
TRAINING DEVELOPMENT ATXW-RMA-TD BLDG 2864					
Director	Dr. Spehn	7058	6014	6019	7059
Secretary	Ms. S. McKinney	7058	6014	6019	7059
Chief, Curriculum Development	LTC Bradford	7058	6014	6019	7059
Project Officer	MAJ Speed	7058	6014	6019	7059
Project NCO	SFC Belasto	7058	6014	6019	7059
NCOIC	SFC Morris	7058	6014	6019	7059
Chief, Literature and Media Division	MAJ Rock	7058	6014	6019	7059
Visual Information Specialist	Mr. C. Brown	7058	6014	6019	7059
Writer/Editor	Mr. R. Britsch	7058	6014	6019	7059
Writer (Proposed)					
Chief, Analysis Division	MAJ White	7058	6014	6019	7059
Project Officer	CPT Sims	7058	6014	6019	7059
Education Specialist	Dr. Ferrier	7058	6014	6019	7059

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