

COMMUNIQUÉ

Issue No. 1-80

USAOECS Bulletin

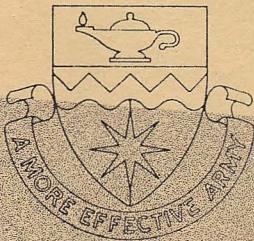
Winter 1980

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

.... "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."

General Edward C. Meyer

USAOECS



U.S. Army

Organizational Effectiveness Center and School

Fort Ord, California

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

Winter Issue

The OE Communique

No. 1 - 1980

COL William L. Golden

Commander/Commandant

SGM Melvin R. Hewitt

Command Sergeant Major

MAJ Paul J. Rock

Editor

Robert B. Britsch

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Art Director

LTC Ronald L. Sheffield

Directorate of Operations and Support

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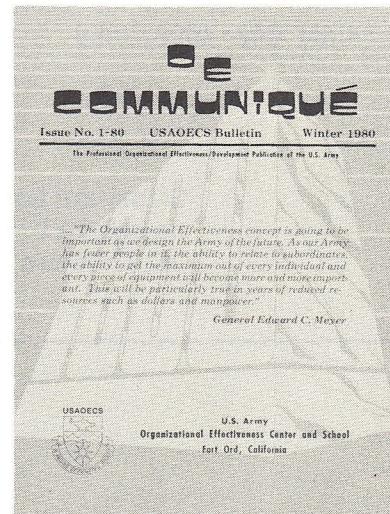
Directorate of Training

MAJ Fred Cooper

Directorate of Evaluation

About The Cover

Organizational Effectiveness (OE) will accompany our Army as it ventures into the 1980's and beyond. The challenges of the 80's present exciting opportunities for OE to become a fully participating partner in the leadership and management of our Army and to contribute to the achievement of lasting solutions to critical Army issues. The quote on this issue's cover is from an October 23, 1979 Army News interview with General Edward C. Meyer, Chief of Staff, Army.



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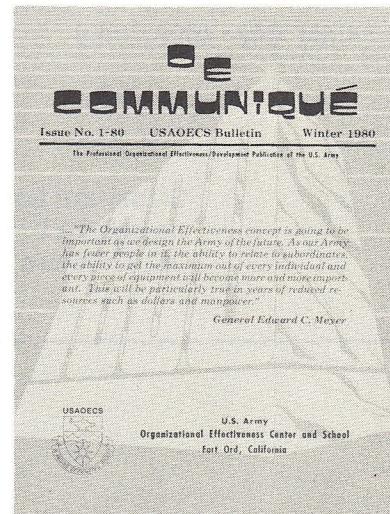
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The OE Communiqué

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MISSION

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

Submission deadline for contributing material for the next issue of the OE Communiqué is 17 March 1980.

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Commandant's Comments

COL. William L. Golden



The new decade is upon us and with it has come a situation of world tension which brings nation-wide recognition of the need for Army preparedness. The transition of the focus of OE from its initial principal orientation on personnel management and human resources functional areas to its more encompassing use as a general management tool applicable to problem solving across the broad range of command/management and staff responsibilities could not be evolving at a more fortuitous time. Opportunities have never been more abundant for the Organizational Effectiveness process to help improve or resolve problems in training, materiel and project management, readiness, modernization, recruiting/retention, mobilization and like endeavors. The humanistic dimensions of the OE endeavor remain important but if you, as an OESO/OENCO, are spending all your time assessing command climate, conducting LMDCs or teaching Maslow's hierarchy of needs, you are missing the most challenging and potentially highly significant opportunities.

The Voluntariness of OE

Traveling OECS staff members have discovered some instances of OESO/OENCOs passively sitting in their offices waiting for the phone to ring because "OE is a voluntary program for commanders." The regulation is specific about voluntary use, but it does not prevent you from actively and continuously advertising your product. The boss who doesn't know what you have to offer will not be seeking your assistance.

Confidentiality and Anonymity

These two terms represent concepts which are central to the effectiveness of the OE endeavor. When violated, whether inadvertently or by design, the backlash and potential for reprisal can be, and have been, severely detrimental to the credibility of OESOs and of the whole effort. I call upon you to take special care to preserve the all important OESO-to-user and OESO-to-interviewee relationships.

General Officer Perceptions of OE Benefits

OE still does not get enough good press, partly because OESOs are not sending us results and partly because many users continue to sense that it is unfashionable to reveal their use of OE. To get some results-oriented information I am now dispatching letters to general officers who are known

OE users to gather their perceptions of what OE has done for their organizations and/or them. Since you may be called upon by your boss to assist with the reply, we have included a copy of that request in this issue. We are looking for succinct statements containing concrete and specific results - results useable by Department of the Army in reports to policy makers and budgeteers.

Send OECS Your OE Results

If each OE office around the world were to send me a one-page summary of one OE assistance activity (excluding command transitions, please) and citing dollars, time, miles or manpower saved, percentages appropriately increased or decreased or other specific results, we would have enough data to precipitate OE use by almost all of the Army. Send me yours.

Where is Your Replacement?

Some OE offices are suffering significant underlap because OESOs expect the "System" to put their replacements on station. Unfortunately, the system frequently needs to be pushed, prodded and punched to get optimal results. You who sit on your thumbs may PCS from an empty office, particularly if you are moving from 18 months in the OE office to another job within USAREUR. You who learn the intricacies of the personnel system can help get OESOs on station and preclude another office start-up situation.

24-Hour Answering Capability

Call OECS for assistance anytime, day or night and on weekends. Our newly installed answering recorder at Autovon 929-2606 will be on duty during off duty hours and your recorded message will be addressed the next duty day. For crash requirements call the Fort Ord duty officer at Autovon 929-4209 who can contact an OECS representative.

The History of OE

Our call for recollections and documentation for the compilation of a "History of OE in the Army" has met with considerable success. If you have overlooked adding your contribution to our accumulated 49 inches of documents through which a committee chaired by SGM Hewitt is now sifting, please do so. We continue to seek info on personalities, events, anecdotes, good and bad endeavors and anything else which will help chronicle the business of OE.



DEPARTMENT OF THE ARMY
U.S. ARMY TRAINING AND DOCTRINE COMMAND
ORGANIZATIONAL EFFECTIVENESS CENTER & SCHOOL
FORT ORD, CALIFORNIA 93941

BG X.M. Halftrack
Commander
Camp Swampy, USA

Dear General Halftrack:

Recent comments by the Chief of Staff concerning the importance of the Organizational Effectiveness concept to the Army of the future and an increasing use of Organizational Effectiveness/Development practices in most agencies of the federal government have helped to heighten Army awareness of OE's potential. The size of the group of Army commanders, leaders, managers, directors and supervisors who have come to understand and use OE as an additional management tool within their organizations grows daily.

There are two other groups. One considers OE/OD to be "just a poor substitute for good leadership" and probably will never use OE. Another is of members who are neutral, uncertain, wary or even apprehensive of OE. They are mission minded pragmatic people who will be likely to use OE only if it is demonstrated to enhance readiness, improve training, streamline logistics, facilitate unit and project management and the like. It is to the latter group that this current effort is oriented.

You are known to be a user of OE as one of your leadership/management tools. You are also widely known in the Army and respected for your managerial success, and therefore, can have an impact upon the acceptance of OE assistance by those who have yet to test its efficacy. Your testimony will be heeded. I am, therefore, asking that you assist Army commanders and managers by informing them, through me, of some of the beneficial results of OE assisted activities in which you have taken part or of which you have knowledge. Your contributions will be used, from time to time, in appropriate publications and/or academic presentations and will be attributed to you by name and position.

I have enclosed a simple form to facilitate your reply and a list of previously documented OE results which may help stimulate your thinking.

I look forward to your reply with the expectation that yours, and selected others, will influence uncommitted commanders and managers to give the OE process a try.

Wm L. Golden

2 Incl
as

WILLIAM L. GOLDEN
Colonel, Infantry
Commandant

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:

READINESS/DEPLOYMENT:

OPERATIONS:

MATERIEL MANAGEMENT:

OFFICE/UNIT/COMMAND MANAGEMENT:

OTHERS:

You may attribute the above
to me my name.

BG X.M. HALFTRACK

SOME RESULTS OF ORGANIZATIONAL EFFECTIVENESS ASSISTANCE

The artillery battalion average performance at ARTEP-standard-level on thirteen missions went from five to eleven.

TOC and G-Staff coordination and information exchange improved significantly during the FTX and thereafter.

"Where in the past directors frequently fought the Command Group (at) the informal work group (level), they are now full participants in the decision making process and, as such, are committed to those decisions."

The result was better patient care through the development of cooperation and teamwork among physicians, nurses, technicians and administrators - a significant change.

"Reenlistment among the undecided increased by 8% over the four months following a series of career development seminars conducted for E5s and below."

The endeavor resulted in a significant reorganization of my headquarters - to better accomplish our multiple missions.

I am now getting unfiltered information from across the command - the full range of decision making info that I wasn't getting before.

This Reserve Command increased its reenlistment rate from 27.8 percent to 77.8 percent.

The standard commissary construction design is more efficient for everyone concerned and will save 1/2 million dollars each time a new commissary is built in CONUS.

The reenlistment rate for first-termers increased by 250 percent and that of careerists by 300 percent in a 3 month period.

We gathered input from across the division and put together the best 18 month training program I have ever seen.

Across-the-board results have been so beneficial that we have sent five additional officers from out of our hide to become OESOs.

The seminar helped develop organization and individual goals, responsibilities and objectives - contributed directly to preparing the new OER support form.

Incl

CONFIDENTIALITY

The following timely thoughts on the subject of confidentiality are offered by Dr. Mel Spehn, Director of Training Developments Directorate, OECS:

Imagine that you are an instructor of OE in a service school. You are teaching the role of the OESO. Topic: Confidentiality. "And, of course, all the information the OESO gathers remains confidential", you confidently tell the students.

"Oh yeah?", groans a captain in the front row. "I wish the OESO at my last post knew that."

Another voice in the back of the room joins his, "I got called in by my CO. He pointed to a computer printout and said, 'Captain, your company has a figure here I'd like to hear you explain.'"

Several other voices all with the same complaint are added to theirs and you the instructor are definitely on the firing line. What do you say? Do you accuse the students of misunderstanding what their COs were saying? Do you try to make a subtle distinction between confidentiality and anonymity? Blame the OESO? It is a very sticky situation to be in. And, unfortunately, many OE instructors are currently finding themselves in this bind. It is not fair to them, or helpful to the whole OE effort in the Army.

There is no easy solution to a breach in confidentiality. Like an ocean oil spill, it is messy and hard to control once it happens. All we at OECS can do is once again reiterate our concern to students taking the 16 week course and to our graduates in the field.

We encourage the exercise of extreme caution and common sense in the handling of data gathered in a unit. The amount of data a commander gets and the way he gets it is the OESO's responsibility. The initial memo of understanding should make clear to the user what he will get and the limits of his use of the data. General trend data can be distributed on a "need to know" basis. Particular people and units must be protected unless their explicit, free release is given.

The regulation establishes the policy: "The initial results are reported on a confidential and anonymous basis to the commander of the assessed unit." (AR 600-76, F.L.). The words "confidential" and "anonymous" have a common usage in the OD/OE community. "Confidential" means: 1) Restricting the availability of aggregate command data to persons within the command; 2) Restricting the availability of unit, division, and work group data to the respective unit commander, division chief, and work group supervisor and their respective subordinates. "Anonymous" means protection of the individual's responses to surveys and interviews by 1) suppressing work group or demographic data when a work or demographic group has few members and 2) exercising maximum care in coding and in handling completed survey response sheets. These are mere words on a piece of paper; but their spirit must be exercised sensitively in each and every OE effort.



Editor's Comments

MAJ Paul J. Rock

"There comes a time in the affairs of men when you just have to take the bull by the tail and face the situation."

W. C. Fields

At the most recent OE Review and Planning Committee (RAPC) meeting, a suggestion was made that OECS look into the possibility of establishing a central distribution point for commonly-used handout materials (e.g., FIRO, LEAD instruments, etc.)

After much consideration by our training literature folks, it was concluded that although the idea has much merit, it presents logistical and administrative problems that require resources beyond our current capabilities.

An alternative might be to purchase the rights to publish these instruments as DA forms. However, the tasks of deciding which forms to purchase and the development of reliable usage factors to justify the expense of purchasing the rights (which would probably be substantial) would require more effort than we can afford to give.

If anyone has any ideas on the subject that we could share with the rest of our readers, please drop us a line addressed to: Letters to the Editor, OE Communiqué', USAOECS, Fort Ord, CA 93941.

PHOTOS

We would like to include photographs of the contributors to the OE Communiqué'. If you're interested, please submit a sharp, black and white photo (head and shoulder shot preferred) along with a 50-75 word biographical sketch with any manuscript that you wish to be considered for publication.

While we're on the subject of photos, we'd like to solicit your help in establishing our photo file. Please feel free to submit photos representative of the kind of organizations where OE is being used. You authors may want to include photos along with your manuscripts to enhance the story they tell. Any and all contributions are welcome.

LETTERS TO THE EDITOR

Editor:

I recently had a need for a survey that addressed coordination and staffing. I looked high and low but was unsuccessful in my attempt to find one already in print. So, I developed my own survey and hereby tender same to OECS. Perhaps other OESOs can benefit from this survey.

MAJ Tom Levitt
Tobyhanna Army Depot

Major Levitt's survey can be found on page 127 of this issue.

Ed.

Editor:

Attached is a sample of a post-transition letter that was utilized by one of our clients. This letter was very well received by the participants as it was solid evidence that the commander had listened to them during the transition meeting and that he had remembered their concerns. Due to the positive reaction, we are encouraging each client that has a transition meeting to use this format. Also we urge that the school adopt it for their model of the transition meeting.

MAJ David C. Kregar
SSG Thomas W. Reed
56th FA Bde

The transition letter can be found on page 126 of this issue.

Ed.

Editor:

In the July 1979 OE Communiqué', on page 73 - Sources & Resources an article entitled "Better Late than Ever", made reference to the number of OESO's required to change a light bulb. I believe the answer given to that question is inaccurate.

Considering the current state of the art the correct answer should read:

ANSWER: Four - one to change the bulb with three to share the experience and one OENCO to give an added dimension.

MARVIN J. WILLIAMS, JR.
Sgt 1st Class, USA
OENCO, USASCH (Hawaii)

Editor:

I would like to offer the following comments for the edification of the NCOs involved in the OENCO Pilot Program, especially those with concerns about reporting their utilization outside their PMOS.

OENCO (and OENCO raters) should pay particular attention to the "Duty Position Title" and to the "Brief Description of Duties" aspect of the SEER (Senior Enlisted Evaluation Report). These blocks must reflect OENCO duties. In order to facilitate the total soldier concept, raters and indorsers should also indicate the military stature of the individual in addition to OENCO duties and accomplishments.

Additionally, NCO should verify DA Form 2-1 (Personnel Qualification

Record) to assure entries indicate completion of the Organizational Effectiveness Noncommissioned Officer Course and the assignment position as OENCO. (POC: CPT Rita Csonka, DAPC-EPZ-P, AV 221-7692/3).

Additionally, EPMD has made information available to promotion and school selection boards regarding the utilization of NCOs in the OENCO Pilot Program.

NORITA F. CSONKA
CPT, GS
OESO, EPMD

Editor:

While reading the OE Special Text, ST 26-150-3 Conducting Effective Meetings, I was struck by two general themes of the text: 1. Meetings with no specific purpose or agenda, are inherently bad and cause the participants discomfort. 2. Regularly scheduled meetings should not be held unless a specific agenda can be developed.

Since regular staff meetings have been held in military organizations since the inventions of staffs and, to my personal knowledge, often with no specific agenda and with no significant issues discussed or resolved, I wonder if perhaps there was another reason for holding such meetings.

At our very next staff meeting I did some "process observation" and questioned everyone I could buttonhole long enough to give their reasons for meetings and tried to recall what had taken place at meetings I had attended in the past.

I concluded that there are at least two major reasons for staff meetings:

1. Accomplish a specific agenda. (CONTENT)
2. Accomplish an underlying agenda. (PROCESS)

The reason for existence of the staff meeting at a regularly scheduled time within a structured organization is as deep and just as important to the organizational process as the content of any issue discussed or decision made. It makes little difference if anything of importance is discussed, it is only important that the meeting take place.

If a unit abolishes all regular meetings, a feeling of disorganization surfaces and there is a loss of rhythm and structure around which to schedule events. The leader or manager who is then unable to perform his former power function as the owner of the meeting finds it necessary to conduct smaller meetings which quickly become regular in nature and expand in scope until they are very like the meeting which was abolished.

Some very important group process takes place around the regularly scheduled staff meeting in the military:

The commander's control over the persons attending is reaffirmed so is the relative position of each attendee.

The subordinate is invited into the commander's arena in a social, normally safe atmosphere.

This contact is necessary and the meeting is the accepted excuse for the contact.

The subordinate gains status from his subordinates by being listed to attend. (Regular list status outranks invitation status)

Lateral communication and pairing between attendees prior to and after the meeting is important group process.

Regular attendee may have a subordinate attend for him/her on occasion, this can accomplish two things: 1. Reward the subordinate for loyalty or hard work by allowing him/her to be a part of the "power scene". 2. Increase the appearance of importance of whatever task or event prevents his/her attendance.

As OE consultants we should be aware of the numerous group processes which are constantly going on around meetings which are necessary for the functioning and development of the unit. Before these process vehicles are destroyed or altered it

is wise to consider what process mode might replace them.

It is not essential that meeting participants understand what processes have taken place nor is it necessary that the participants feel comfortable or feel that something worthwhile was accomplished.

As I interviewed leaders who attend staff meetings to arrive at the ideas I have presented here I often heard the following statement: "They (meetings) rarely accomplish anything very important". I responded with "What would you like them to accomplish"? I am still waiting for an answer.

LONNIE E. WEST, SFC
OENCO, US Army Intel
Center and School
Ft Huachuca, AZ 85613

Updates

DA Updates

WHAT'S HAPPENING IN OE--
FROM THE DA PROGRAM MANAGERS

LTC JOE MOMORELLA
HQ DA

Army Chief of Staff Briefed on OE.

A comprehensive update briefing on the OE program was given to General Meyer on 18 December. The briefing covered three main areas: (1) the state of the program after three years; (2) the impacts and payoffs; and (3) future directions. This was an OE milestone. Since it was the first time OE was presented to the new CSA, it answered the question of "what happens to OE when General Rogers leaves?" Well, the answer is--OE stays. It is showing value to the Army so it stays. Furthermore, it will do more by focusing on key issues that commanders want solved.

LTC Mike Plummer gave the hour-long briefing. Many aspects of the program were discussed, including quality selection of OESOs (note: OESO track record continues to run above average on promotion and CGSC/AFSC selection), the resources (money and people), how we are measuring OE's value to the Army, and specifically, what are the opportunities--key issues--to which OESOs can contribute. The outcome was positive; it was a good session. Our recently approved OE 3-10 Year Plan gives us the management tool to guide OE through the next seven years (FY 80-86). Incidentally, we've included the plan's main chapter with this article. Its major thrust is transition from the current focus on HR to a focus on broader total systems. Please note--it's a transition--we plan to "be there" in seven more years. Of course this is based on many things falling into place, transferring some skills, learning new ones, educating the user and most important, matching our capability to what the Army needs. The Chief of Staff of the Army is vitally interested in the OESOs ability to deal with an organization's key issues.

Performance management and objective setting are excellent opportunities for the OESO, especially with the introduction of the new OERS (See CSA comments on performance objectives, OE Communique - October 79, p. 46). Take the initiative.

OE Payoffs

OE will continue to be a good, solid program as long as it is of value to the Army. This message was loud and clear when we briefed the CSA. "Value to the Army" has to be measured and it can be measured in many ways. Sure, cost benefit is a very good method but there are times when a good subjective narrative by a senior commander can do just as well. We've collected excellent data on the effect of transition workshops, team building, and process performance feedback operations. A lot of good statistical work has been done on measuring the organizational climate in units using OE. We're getting smarter in evaluation methodology and putting results in those terms that Congressional staffers understand.

What the program will benefit most by right now is a set of abbreviated "case studies" that describe an OESO's contribution to a key issue that would be faced by a battalion, brigade, division or installation commander. The format is simple: (1) what was the problem; (2) what was the OE methodology used; (3) what the operation cost the commander in terms of people and time; and (4) what were the results. It can be brief (two or three pages) and there's no need to mention units or persons' names. You can really help your program by reporting one of your stories; send it to your MACOM or to OECS or call us at DA.

DA OE Program Managers

There are quite a few new faces in the OE office at DA. The OE Division has been expanded to include the Leadership Division. LTC Mike Plummer heads up the combined offices. The merger was done primarily for bureaucratic reasons, i.e., save spaces; but there's some functional logic to it as well--individual development/organizational development. LTC Joe Momorella is now the chief of the OE office and also handles the evaluation and research functions of the program. LTC Dick James deals with education and training; MAJ Lew Flanders handles program and personnel management. Marilyn White works with the civilian aspects; LTC Fred Phillips and MAJ Norm Chung are involved with the resources--budget and spaces. Linda MacKissock, our secretary, holds the whole place together. Our office numbers are AUTOVON 227-3700 or 227-6025. The OESOs for the DA Staff are located in the Chief of Staff's office. The group is headed by COL Ted Voorhees, and includes LTC Frank Burns, LTC Wayne Ploger, LTC John Novotny, LTC Bob Lander, Guy DeFuri, Bill Masters, Kay Powers, and Diane Treadway. Give us a call and let us hear what's happening. We plan to keep this column going with the main purpose being to keep you informed.

For the OESO

We've said a lot about the "OE program." The OESO is the OE program. You make it work. The Army's perception of OE and what it can do comes from the way commanders and key managers see you and what you do. The Army determines the path on which OE moves; we at DA can only guide it along that path.

3-10 YEAR PLAN

The following comments were contained in a letter of transmittal from the Office of the Chief of Staff. The letter forwarded the OE 3-10 year plan to all MACOMs.

3-10 YEAR PLAN

"Attached is the action plan to improve the Army's OE capability to better assist the Army in obtaining its goals and those goals of its organizational commanders. In the FY 80 Army Posture Statement these goals are defined as: force readiness, strategic deployment, human readiness, management, and modernization. In order to provide commanders an OE capability that will assist them in achieving these and future goals, the present focus of OE must make a transition to a broader systems orientation. This plan is the vehicle to manage that transition. It establishes the milestones, responsibilities, and management structure required to accomplish the transition in a manner that will ensure OE continues to meet the needs of the Army."

I. GENERAL

1. BACKGROUND: In April 1977, the Chief of Staff, US Army, tasked the DCSPER to institutionalize OE in the Army. Institutionalization of OE was seen as taking 8-10 years and was divided into three phases:

- a. Phase 1 - Establishment (1-3 years).
- b. Phase 2 - Integration (3-10 years).
- c. Sustainment (10 years plus).

Milestone objectives in all of the staff functional areas required for HQDA to manage phase I are contained in the OE Plan distributed in August 1977. This plan guides the program until October 1979. The purpose was to establish OE as an Army program to include: training staff officers, legitimizing positions and resources, and publishing an Army regulation (AR 600-76) to provide policy. During this phase, the focus of OE was mainly in the personnel management and human resources development functional areas.

2. STATUS OF OE TODAY: OE is the systematic military application of selected management and behavioral science skills to improve the organization's ability to accomplish assigned missions. The use of OE is to increase the involvement and commitment of people at all levels to accomplish organizational objectives. As a result, combat readiness increases. The ultimate benefit of OE is in assisting commanders to improve the effectiveness and performance level of their organizations under conditions of both peace and war. Current OE applications in the field, for the most part, are focused at battalion level. There is a growing Army requirement to focus OE on major issues requiring the adoption of a system-wide perspective using more complex OE methods and applications.

3. FUTURE STATUS: OESOs are an expensive resource which must be used effectively to derive maximum benefit for the Army. Competition for scarce resources of all kinds will continue in the future; therefore, it is essential to maximize the payoffs and benefits from OE that can be used at higher and more complex levels of the organization. They will focus on broad major issues in support of Army goals. Typical kinds of OE applications will include:

- a. Clarifying organizational values, goals, missions, objectives, and individual performance expectations.
- b. Improving organization-wide planning processes.
- c. Providing expertise on organizational design and redesign decisions which include assistance with implementing and managing these processes.
- d. Providing expertise on managing major organizational change, i.e., new OER, equipment modernization, policy changes, and reorganizations.
- e. Assisting in the improvement of resource allocation procedures and decisions to achieve command-wide goals.
- f. Providing staff support for critical organizational transitions (key personnel and unit) in order to sustain and improve readiness and performance.
- g. Attaining unit training objectives more quickly.
- h. Improving the retention of military personnel.
- i. Provide consulting assistance to improve general management throughout the Army.
- j. Provide expertise to improve the function of systems that cross organizational boundaries.

Whenever possible, OE knowledges and skills (assessment methods, goal setting, transition techniques, and time management) will be transferred to Army personnel through the Army Education System. This will enable OESOs to focus more on issues at higher organizational levels and to support MACOM and other organizational goals.

4. KEY PLAN OBJECTIVES: The critical tasks that must be completed to accomplish the 3-10 Year Plan are:

- a. Develop OESOs with skills and competence necessary to assist commanders in dealing with higher level command and management issues.
- b. Educate military and civilian leaders on how to apply OE to improve their organization's performance. This is a continuing process and critical to ensure the future of OE.
- c. Improve the system to evaluate the progress of the OE program.
- d. Establish management procedures and a manpower structure that will allow the OE program to make the required transition.

5. PLAN GUIDANCE: The 3-10 Year Plan is based on the following guidance:

- a. OE will support the "Total Army Concept"
- b. OE will continue to be voluntary.
- c. The current policy on anonymity and nonattribution will remain in effect.
- d. The OE structure, personnel selection process, and education system will provide the Army with OESOs capable of dealing with key Army and command-wide issues.
- e. Consideration of OE combat applications will be integral to program planning and operational activities.
- f. General policy and resources management for OE will remain centralized at HQDA, with responsibility for program execution and internal consulting operations decentralized to MACOM HQ and below.
- g. An OE evaluation system will be used to selectively assess the scope and impact of OE in the Army consistent with the guidelines established in paragraph 5c, above.
- h. MACOMS and HQDA will continue to provide an internal and external OE consulting support capability.

6. FUNCTIONAL AREAS: The plan is divided into seven functional areas:

- a. Program management.
- b. Resources/manpower structure.
- c. Personnel selection/assignment.
- d. Research.

- e. Evaluation.
- f. Education and training.
- g. Information.

OECS Updates

TRADOC CHIEF OF STAFF SPEAKS TO OESOC 4-79

Headquarters TRADOC Chief of Staff, Major General John B. Blount was the distinguished guest speaker for OESO graduating class 4-79.

MG Blount's remarks provided the class with a contemporary look at the young soldier in our Army. His concern and affection for these soldiers were evident in the anecdotes of his encounters with them. It was also very evident that he believes that today's soldier possesses the quality needed to do the job of the Army.

With this part of his presentation as a backdrop, he outlined the role of OE and the OESO. Quoting the CSA's goals for the Army - "Ready to fight today; Prepare to fight tomorrow; Create an environment in which you can do that" - he said, quite simply, that "OESOs must go into the Army and help the Chief of Staff of the Army and those commanders out there to do their job".

In his specific guidance to 4-79, MG Blount urged the class to work at enhancing the special relationship that OE has with commanders; to keep their language and approach simple; to publicize their success; and to study hard, learn the trade and keep fit.

OECS and Class 4-79 were greatly enriched by the remarks of this distinguished soldier.

TRAINING DEVELOPMENTS DIRECTORATE

I TRAINING LITERATURE

NEW PUBLICATIONS:

Reference Book 26-8, OE Operations Reporting Handbook will be ready for distribution to OESOs and Key Managers in February. This publication provides "how to" instructions and samples to assist in the documentation of OE operations in the form of after action reports and case studies. It also contains a format for use by the OE user to provide feedback on the operation.

Special Text 26-150-4, Conflict Management. This is another publication in the continuing OE subjects self-study program series. This publication will also be made available as Army Correspondence Course OE 0004. Students may enroll in the OE 0004 version for credit which leads to the awarding of promotion points. Students may enroll by submitting a DA Form 145 to:

Army Institute for Professional Development
US Army Training Support Center
Newport News, VA 23628

The local education service officer can assist in completing the form.

Special Text 26-150-5, Performance Objective Workshop. This publication details a half-day "hands on" workshop that can be conducted to assist raters and ratees to development performance objectives as required by the new DA Form 67-8-1 Support Form. The instructor in this workshop need not be an OESO due to the step-by-step "have to" format of this publication.

These publications may be obtained by writing to:

Commandant
USAOECS
ATTN: ATXW-RMA-TD
Fort Ord, CA 93941

No more than two copies of these publications will be sent a requestor since local reproduction of these publications is authorized.

II TV TAPES

Honest! No Fooling! For Sure!! The "What is OE" TV tape has finally cleared the last administrative hurdle and is in the process of being reproduced for distribution. Your local TASC film library is scheduled to receive copies of TTV-120-68 during the month of February 1980 (Honest).

III SERVICE SCHOOL OE INSTRUCTOR's CONFERENCE

OECS will host a TRADOC-sponsored Service School Instructor's Conference during the period 22-24 Jan 80. Representatives from virtually every TRADOC service school will be in attendance. The conference's purpose is to maintain the high quality of OE instruction throughout TRADOC by:

a. Providing an opportunity for the exchange of methodologies and technologies by the various service school attendees.

b. Providing attendees with an update of TRADOC's policy regarding the Quality Assurance Program.

c. Providing participants with an opportunity to review, discuss, and comment on the revised OE service school instruction modules through a series of "Techniques That Work" workshops. Included as an important aspect of the conference will be extensive discussion on:

a.. The future of OE instruction with a view toward raising the level of sophistication.

b. The feasibility of incorporating OE instruction in the various warrant officer courses.

OPERATIONS & SUPPORT DIRECTORATE

OESO Class 1-80 arrived at OECS 11 January with 58 total personnel. This class is unique in several ways in that there are 16 National Guardsmen Officers and 2 Veterans Administration personnel attending the course for the first time. It is the largest class to have ever entered OECS.

OECS now has a 24 hour telephone recording service that will record your messages and will enable OECS to better respond to out of CONUS request for assistance and/or information. That telephone number is AUTOVON 929-2605. 1LT Holliday is now the Adjutant/Student Commander.

TRAINING DIRECTORATE

OVERVIEW

As the new Director of Training I would like to update you on what we have been doing in Training in some detail and to look forward to 1980. In short, we have had a busy and effective year. The following will give you information on our major functions and past and future activities. As you know, the Training Directorate is responsible for all OE related Training, the management of the Library, and providing instructors on request for outside consulting efforts. During 1979, we conducted:

- 4 Officer OESO Courses, graduating 123 officers and civilians.
- 2 OENCO Courses, graduating 97 NCOs.
- Conducted 6 Key Manager Courses with 131 participants.
- Conducted 6 Leadership and Management Courses.
- Conducted a study for TRADOC on Initial Entry Training.
- Participated at the S-1 Course at Fort Ben.
- Participated in the pre-command course at Fort Leavenworth.

During 1980 we will:

Conduct 4 OESO 16 Week Courses with about 54 Officers and Civilians per course. Of special note, Class 1-80 will have 64 students, of which 2 students will be from the V.A. and 19 from the National Guard.

The OENCO course is not yet scheduled.

We plan to conduct about 4-6 Key Manager Courses.

Continue to participate in the pre-command course.

Conduct 8 Leadership and Management Trainer Courses.

Train selected IG's, S-1's, social workers and instructors at the Army Training Board in OE skills.

Expand our knowledge in OE with other services.

Implement an assessment center for our students directed towards assessing skills required to be a consultant.

Consult when not teaching and to attend Professional Development to infuse our curriculum with state-of-the-art concepts in O.E.

As you can see we will have a busy Training year and will be working hard to provide the very best training possible. This effort will be conducted by the following faculty.

TRAINING DIRECTORATE MEMBERS AND MAJOR TASKS

LTC William Fisher (Armor) formerly Chief of Individual Skills Division is now the Director of Training. Ms Crouch, SP5 Smith and SP4 Jones form the Administrative Staff.

LTC John Bahm (Artillery). John continues as special projects officer and instructor. John has conducted the majority of OE instruction at the pre-command course. He will depart in the Spring to take Command of an Artillery BN at Fort Ord, CA.

Mr. Bob Goodfellow is Chief of Consulting Skills (Weeks 6 - 16). He also supervises the S-1 Course, IG Course and Key Managers Course.

The following officers, civilians and NCO's are working with Mr. Goodfellow:

LTC Jim Berg (Armor). Jim joined the faculty in the Fall of 1979. He was an OESO in Europe.

MAJ Fowler (M.P.) joined the faculty in the Fall 1979 and was an OESO at Fort Ben and Korea. He also instructs at the pre-command course.

MAJ James (Infantry). Carl continues to teach consulting skills and will be departing in June 1980.

MAJ Kniker (Infantry). Nate continues to teach consulting skills, manage the Key Managers Course, and work as an OESO.

MAJ Ron Smith (Infantry). Ron was an OESO at Fort Riley and now instructs in consulting skills.

MAJ Bill Langford (Sig C). Bill was promoted in the Fall and continues to work in consulting skills and assisted in the instruction at the S-1 course at Fort Ben.

Mr. Cliff McDuffy. Cliff was an OESO at Fort Ord and joined the consulting skills faculty.

SGM John Cato. John is an instructor in consulting skills and assists MAJ Langford.

SFC Belasto is an instructor in consulting skills.

SFC Konarik is an instructor in consulting skills.

SGT Dunn is an instructor in consulting skills. He will be departing for Europe in January 1980.

MAJOR Dulin and CPT Pieret have departed.

MAJ Ernie Lenz (MSC) is Chief of Individual Skills (Weeks 1-5). He supervises, LMDTC's, Assessment Center and coordinates activities with Medical Service Command and the American Psychological Association and course certification.

The following officers, civilians and NCO's are working with MAJ Lenz:

Dr. Larry Guido. Senior civilian instructor in Individual Skills and Director of our new Assessment Center for students and consultants.

Dr. Jerry Eppler. Instructor in Individual Skills. Guru for the Center and LTC Fisher. Of special note is his MACRO-Level consultation effort at Fort Lee, Virginia.

Dr. Elyce Milano. Instructor in Individual Skills. She continues to consult with major commands and the I.E.T. study.

MAJ Gay Hatler (CH). Instructor in Individual Skills and Chief Instructor for spouse LMDC Workshops.

CPT Marsha Hawks (MSC). Instructor in Individual Skills and Manager of LMDTC's.

MSG Svestka is an instructor in Individual Skills. Ed departed the Center in December 1979.

SFC Pierre is an instructor in Individual Skills and assistant to CPT Hawks for LMDTC's.

Ms. Herrick is the Director of the Library. Lynn continues to excel at her work and assists with Individual Skills instruction. Ms. McLaughlin has joined the Library Staff.

As you can see the Training Directorate has excellent instructors with extensive OESO experience.

CURRICULUM UP-DATE

The 16 Week framework is basically the same but we continue to update the curriculum and feel we are presently an excellent course, which is redesigned based on feedback from the field and extensive data from the Evaluation Directorate. The following information will provide a brief up-date on our curriculum. During December 1979 we made plans to add: combat-related OE (process performance of Battle Staffs and Mobilization), project office management, (coalignment, ethics, long-range

planning establishing an office, marketing, etc.), knowing today's commander, case studies (Battalion and higher), new evaluation techniques, Assessment Center, MACRO SYSTEMS, Socio-technology, conflict management, new survey instruments, performance management workshops, improving the faculty advisor program, a mid-course break, developing a course for OESOs to up-date them on new ideas, conducting FTX's at locations that will let students consult at Battalion or higher level and conducting spouse LMDC workshops. In sum, we continue to participate in professional development and outside consulting projects to keep our faculty up-to-date. Other OECS staff are now teaching in the course and greatly assisting our effort. Lastly we will conduct our first assessment of students during Class 1-80. The Assessment Center will be used to develop students in OE skills and guide their learning in the course. MAJ Howerton and SFC Stuyt from Fort Carson are assisting us in training the staff on assessing students. We greatly appreciate their participation. Articles will be in the Communiqué to explain the Assessment Center effort.

FTX CASE STUDIES

This information is provided to illustrate the quality and level of consulting our students are doing and to suggest that the case study provides the data, in most situations, to justify what we do (OE) and the effectiveness of our consulting effort. The selected cases presented are from Class 3-79 and 4-79.

Operation in a commissary which recognized management problems and the need for role clarification and communications.

Advanced Individual Training Battalion. Implementation addressed critical issues, role clarification and time management.

School Brigade and Army Service School, situational leadership and role expectations.

Civilian Procurement Division, Communicates workshop.

Army Readiness Group. Goal setting.

Adjutant General Staff agency. Problem solving and team building.

Combat Engineer Battalion. Open systems planning.

Adjutant General (TAG) State Headquarters.

Action Planning and meeting management.

Engineer Battalion. Action planning.

HQ CO, Engineer Battalion. Leadership and Communications workshop.

Deputy Chief of Staff, Army HQ. Communications workshop.

Armored Battalion. Action planning workshop.

Major Army Hospital. Goal setting.

Computer Support Organization. Team development and problem solving.

Training Brigade. Expectation workshop, transition and problem solving.

Training Battalion. Top-team development socio-tech, structure design.

Installation DFAE. Action planning.

Training Brigade. Problem solving.

DA Level School (Post action planning)

CIVILIAN ACADEMIC CREDIT FOR OECS COURSES

The Office of Educational Credit (OEC), a function of the American Council on Education (ACE) is a continuing information service to assist post secondary institutions and state departments of education, in evaluating the educational experience of military personnel.

In April of 1978 ACE recommended that the Organizational Effectiveness Staff Officer Course be awarded 16 graduate credits. These credits may be applied to a graduate program in a number of ways: (1) applied to the major to replace a required course; (2) applied to an optional course within the major; (3) applied as a general elective; (4) applied to meet basic degree requirements; or (5) applied to waive a prerequisite.

It should be noted that although ACE recommended 16 graduate credits, the credit granted by a post secondary institution will depend on institutional policies and degree requirements. Most local universities have accepted six (6) of the recommended graduate credit hours.

Credit recommendations for the OESOC are available from the Office on Educational Credit upon written request by educational officials. Credit for the OENCO Course and the LMDC Trainer Course is presently under consideration by ACE. Announcements will be sent to the field when a decision is reached. Inquiries should be addressed to:

Office on Educational Credit
One Dupont Circle
Washington, D.C. 20036
ATTN: Military Evaluations

It is hoped that this will bring you up-to-date and I look forward to hearing from you. In my opinion, the Training effort at OECS is alive and well and well supported by other Directorates.

CONCEPTS DEVELOPMENT DIRECTORATE

Concepts Development Directorate is ready to transition into the 1980s. The 1970s certainly provided enough transition models and variations to assist us in this endeavor. We now have the staff and resources to move ahead and get some concepts off the drawing boards and into the hands of OESOs. Our priorities for 1980 are:

1. Combat-related OE applications,
2. Conduct a socio-tech conference in February of 1980,
3. Development of a prototype advanced course for senior OESOs (May 1980),
4. As operational OE research management center,
5. Continued development of large, complex OE system techniques and,
6. To provide first class consulting assistance to field OESOs.

Division report-outs from Concepts and Studies, OE Research Division and External Operations Division follow:

The Concepts and Studies Division recently submitted a recommendation that OECS host a conference on socio-tech applications and technology. If approved by the Commandant, the conference will be held in February 1980 at OECS. CPT(P) Thomas Hawks and SFC(P) Pete Bartlett are the action officers for this project.

Process performance of battle staffs was introduced in the Pre-Command Course (PCC) 79-6 and was again conducted during PCC 80-1. The results of the 80-1 evaluation indicate that there are mixed feelings among commanders as to the benefits that can be derived by using an OESO in this capacity. Specifically, forty-two responses to the question, "Based upon your experience/exposure to the OESO during the CATTs exercise, would you use an OESO in this capacity to assist in training your battle staff?", were received out of sixty-six. Of these forty-two responses, ten agreed, nineteen were undecided, and thirteen disagreed. This is not

as good as we would like it to be; however, current plans are to continue process performance of battle staffs during CATTs so that command designated battalion and brigade commanders are aware of this very viable tool.

As a spinoff from the FORSCOM conference and the Army Training Board's visit to OECS, Maj Jim Jackson and CPT(P) Tom Hawks visited Fort Hood, Texas, to observe the Battalion Training Management System (BTMS) and to interview commanders, staff officers and OESOs relative to BTMS and combat-related applications of OE. The results of the Fort Hood trip are included in this issue of the COMMUNIQUE. Also included in this issue is the interview with LTC Roy Ray, G-1, 1st Cavalry Division. This interview was instrumental in flushing out a prototype model that OESOs are encouraged to use in assisting commanders with preparation for AGIs. It is anticipated that forthcoming issues of the COMMUNIQUE will contain a new combat-related OE model.

Currently, we are developing an advanced skills workshop for veteran OESOs (at least nine months' experience as a practicing OESO). The goal of this one-week course is to provide field OESOs the latest OE/OD technology (macro systems, combat-related OE and socio-tech). In addition, we want to provide OESOs the opportunity to share lessons learned. MAJ Jim Jackson is in charge of this project. It will be held at OECS (pending approval) in May of 1980.

With the addition of CPT John Price, Ed.D., from the Evaluation Directorate, the OECS Research Division has been actively identifying and classifying information sources in the OE/OD research arena. It is expected that, as the number of these resources expands, the Research Division will be able to better provide the OE community with a "central clearinghouse" for OE/OD research findings. This is an extensive undertaking involved detailed planning and long-range development.

"Concepts" people have just begun exploring the application of "Buck Rogerian" technology to the U.S. Army. For example, in December CD personnel shared in the use of Picturephone technology at a research planning meeting which joined DA, MACOM and ARI personnel physically located in San Francisco (OECS), Washington, D.C., and Atlanta, GA. The meeting enabled geographically dispersed groups to interact face-to-face on direct video lines and accomplish the prioritization of FY 81 Human Resource Needs as well as to discuss and identify characteristics of macro systems.

One of the current and projected areas that Concepts Development personnel are involved in is the meaning and value to OE of so-called macro systems approaches and technologies. CD's interest in this area is consistent with forecasts by OD practitioners for the 1980s (refer to the responses to questions 5 and 6 in the article by Van Eynde and Goodfellow in this issue of the COMMUNIQUE). This is one of several areas that CD will be looking into specifically in conjunction with the 3 to 10 year plan for OE.

The External Operations Division (EOD) opened for business before it opened for business. It has been a very busy time for Looram, Rodier and Duke. Some of the operations either underway or anticipated have included the CG, Army Logistics Center; DEPCMDT, Command and General Staff College; CG, Ft. Monmouth; C/S. TRADOC; CG, CDEC; and CG, Ft. Eustis.

The Division is normally booked six to eight weeks in advance and is giving priority to requests for assistance in dealing with large (macro) systems. These have usually been general officer requests.

As the members of EOD have progressed, they are building an experience base in macro systems and will soon be publishing in the COMMUNIQUE some of the lessons they have learned about operating in large systems and

EVALUATION DIRECTORATE

The Evaluation Directorate is closing out a highly significant year of evaluation activities conducted internally at OECS with the resident classes of the OESOC and the extensive external effort conducted during the field visits that were made in the fall of this year. As the school enters 1980, a revised curriculum has been formulated in response to the data collected from these evaluation efforts. It is significant to note that the 1980 POI will reflect changes that are data based significantly more than in the past. Since the evaluation data is collected on a periodic basis, it enables the POI to be responsive to student as well as field needs while at the same time enabling trainers and training developers at the center to inject new OE techniques into the course. These evaluation efforts could not have been completed without the full cooperation of students in resident classes, key managers and OESOs serving in OE positions in the various MACOMs throughout the Army. Their input is much appreciated and it is hoped that they realize that their input does have meaning in assisting OECS to prepare a better OESO to meet the needs of the field. These evaluation efforts will continue during 1980 and the experience of this year will enable Evaluation Directorate personnel to better focus their evaluation activities.

OE Forum

I'm a User - and Hooked on OE

**LTC David Shephard
G1, V US Corps**

"Organizational Effectiveness", now that has a nice ring to it... but what in the world can it be? As a Corps Equal Opportunity Staff Officer (EOSO) I had occasionally received mail for the OESO and even the EEOO (Equal Employment Opportunity Officer). Doing a bit of investigative snooping I found that the Organizational Effectiveness Officers were designed to be another resource assisting the commander in strengthening the effectiveness of a unit. That concept had a nice ring to it; reminiscent of bugles blowing, flags flapping briskly in the wind, and the aroma of Mom's apple pie wafting thru the air. But what was this animal called "OE"?

My first exposure to the Organizational Effectiveness concept was less than overwhelming. In an attempt to provide career progression for EO NCOs, I had set up a "strawman" proposing the conversion of some EO officer slots that had historically not been filled, to senior NCO positions. The gremlins in the resource management office managed to find this a heaven sent opportunity and they converted those spaces to OE spaces for the Corps. We did not start off on a happy basis, the OE recipients of the thieved positions and I.

Fortunately, at the annual Eighth Race Relations Conference held USAREUR-wide for all commanders in the grade of colonel and higher, I was billeted with the newly assigned Corps OESO. We struck up a friendly relationship (it wasn't his fault the spaces were thievey) which later turned into a professional relationship.

We got to talking about our various fields and found several areas of overlap. At the next V Corps workshop I used some of the OE help. At the Ninth annual Race Relations/Equal Opportunity Conference the Corps was responsible to facilitate eight seminar sessions. We created a combined team of Organizational Effectiveness and Equal Opportunity persons and the result was most heartening. As a result of this joint professionalism the seminars turned out to be meaningful for the vast majority of participants. There were of course those "wieenes" who could not be convinced of anything. This experience was repeated for the 10th Equal Opportunity Conference and we will use it again this year.

We used OE to assist us in developing our V Corps Equal Opportunity Workshops. I had learned, instead of presenting them with what I wanted them to do, it was far better to get them in on the initial planning.

Ownership for the project was mentioned as a rationale. This use in preliminary planning, then to facilitate, paid off.

It was about time to take the plunge and have an "Organizational Effectiveness Experience" in my own office. The entire title sounded somewhat pornographic. Rather than having the guys in the Corps headquarters conduct this experience they (with my heartfelt concurrence) arranged for a couple of OE guys from another command to come in. This was fine with me as I considered the Corps OE guys as being contributors to my problem. I was still not a 100% supporter of OE. Since I didn't know the two OESOs coming in I set a few traps for them. I knew what the problems were in my office. If they uncovered the "known" problems, this would add creditability for the "unknown" problems they uncovered. They passed the test with flying colors. The result of the experience was eye opening. They pointed out a couple of ways in which I could make more money with some of the procedures that I was using by easily implementing techniques I had overlooked. Something about "the trees and the forests" come to mind. This experience served to solidify the value of OE to me and I began to tout the value of it. The best advertising is a satisfied customer.

Since then I have encouraged others to try the OE experience and to use OE talents to improve the operational efficiency of their own units. The confidentiality aspect, the contract aspect and the followup are all viable techniques.

Our OE guys have continued the education process here in the Corps and it is an upward battle.

There are some strengths in the OE Program. Most of the OESOs that I have had experience with in the Corps are well qualified combat arms officers (many of whom have had combat experience) which serves to provide a certain credibility.

I have not had any experience with female Organizational Effectiveness Officers and only one experience with Organizational Effectiveness noncommissioned officers. I consider the integration of NCOs a step in the right direction as too often the perception was that the OE was a closed field for only officers with master's degrees.

What have I learned from my experiences as an OE user? Let's list some.

1. Do not confuse the personality of individual OE officers with the intent and value of the OE skills.

2. OE personnel are more effective when brought in to the initial planning cycles.

3. When the OE user is able to provide well thought out and well written goals and objectives, a better product will normally result.

4. OE personnel have some of the managerial and behavioral sciences updates that help us to interact in groups.

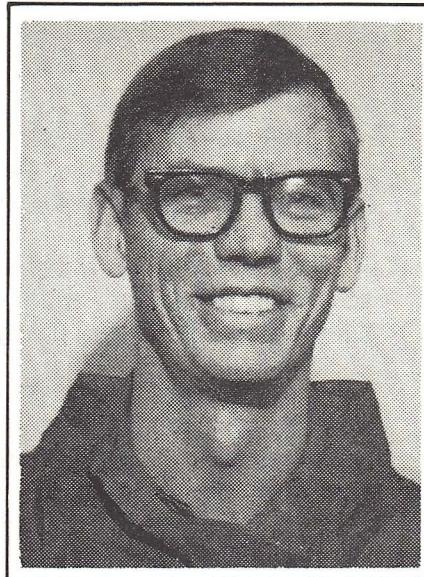
Overall, yes, Organizational Effectiveness Officers have the managerial and behavioral science skills that all commanders and staff officers require to be more effective in groups. Since the Army is a collection of various sized groups (squads, platoons, etc.), this makes sense. I have gone from resentment and ignorance to education and support in the past 3 1/2 years regarding this "O-E" soteric field; thus, it is with a degree of certainty that I can say, "I am a user and hooked on OE."

LTC Shephard's civil and military education include a graduate degree in Public Administration from the University of Oklahoma and successful completion of the Civil Affairs Officer Course, the Special Forces, Counterinsurgency, and Psychological Operations courses from the Special Warfare School, and the National Security Management Course offered by the Industrial College of the Armed Forces. He is a graduate of the US Army Command and General Staff College and the United States Air Force Air War College. Assigned to V Corps in 1976, he first served in V Corps G4 and is presently assigned as Chief, RR/EO Division, V Corps.

Can Anyone Tell Me What OE Is All About?

**SSGT Thomas Reed
Brigade OENCO**

Editor's Note: These comments deal with Organizational Effectiveness (OE) and what it means to soldiers in today's Army. The author is one of 90 noncommissioned officers who are participants in the Army's pilot program of OE. The OENCO pilot program is being evaluated by the Army Research Institute to determine whether OENCOs will become an integral part of the Army's OE program.



What the hell is OE?

I have been asked that question many times by many people: my wife, my parents, friends, commanders, staff officers, command sergeants major. I hope that the following will help you to answer this question.

In 1969, the results of the Army War College studies on leadership and professionalism, the Continental Army Command Leadership Board and study of basic trainee motivation at Fort Ord, California, converged to develop an awareness of Department of the Army (DA) level that the behavioral sciences were not being used to their fullest potential in the Army.

An additional DA study was performed during late 1971 and early 1972 which culminated in the establishment of a number of pilot projects. Among them was the installation-wide implementation of the Organizational Development (OD) concept at Fort Ord, Calif. The OD project slowly expanded to include a training course for mid-level managers and ended with the establishment of the Organizational Effectiveness Training Center in July 1975. (The name has since been changed to the OE Center and School).

What these studies showed was that selected behavioral science and modern management techniques are applicable to the Army. These findings led to the introduction and use of OE on an Army-wide basis.

OE differs from traditional Army approaches to management by including advanced management and behavioral science techniques which have been collectively referred to in the civilian sector as Organizational Development. While OD has been used in civilian industry for several years to solve many of the same organizational problems which face the Army, some of the OD techniques are not applicable to a military organization.

OD methods and skills which complement core Army values and leadership principles have been selectively adapted for use and are collectively referred to as Organizational Effectiveness.

Thus the definition of OE that I use is that it is the application of selected advanced management techniques and selected behavioral science techniques to a military organization.

OE is what is called a "total systems approach." In applying OE to a military organization, one looks at both the "people processes" and the organizational structure, the objective being to improve the entire organization.

This is not to say that OE might not include individual management development of skills, attitudes and knowledge. However, the broad emphasis is on such areas as leadership, group processes, roles, organizational goals, intergroup relationships and structures.

The objective is to ultimately impact upon the organization's behavior, structure or authority relationships, objectives and mission accomplishment.

(Reprinted from "The Pershing Cable," an official unit publication of the 56th Field Arty Bde, Germany.)

Neighborhood Development in a Military Town

LTC David L. Miller, Jr.
Ft. Sill, OK

The purpose of this paper is to describe a model for neighborhood development in a city located near a large military installation. The method employed describes the climate of the neighborhood, physical and social, the population served, and the functions of the OUTREACH Coordinator. The initial contact and integration with the military facilities, community action and organization are addressed. Finally, security actions and future projects conclude the study. The nature of the neighborhood climate is unique, since it is contained entirely in a trailer park with few owners and 56% military tenancy.

The trailer park has 150 units, of which 80 are occupied by junior military families (pay grades E-4 to E-2). It is located approximately ten miles from the Army post which employs the military tenants. Isolated from the civilian community and distant from Army facilities, the newly located wife of the junior military family is often bewildered and frightened by new surroundings. The husband faces a similarly threatening environment at work, where he is the most junior of members. This harsh environment is further reinforced by rules and regulations laid down by a seemingly suspicious landlord. Add to this the regular rows of mobile homes surrounded by chain-link fences and a few sparse trees, and the perceived desolation is complete. It is here that the initial contact of the OUTREACH Coordinator is vitally important.

The function of the OUTREACH Coordinator, a civil service employee of the post's Quality of Life Office, is to make contact with both landlord and tenant. Then the task of community development begins. Community development is the process of organizing the community to be able to communicate its needs to the landlord or other authorities, to visit and encourage visitation among the military wives, and to establish a self-sustaining neighborhood council which will provide mutual support for all who live there. The initial contact with the landlord met with defensive behavior, but the OUTREACH Coordinator recognized the defensiveness as a lack of information, and by the end of the first interview had convinced the landlord of the positive intent of the OUTREACH Program. The reaction of the residents was similar in nature.

Initial contact with the wives revealed their loneliness and sense of isolation. Most had only one car and were unable to get away from the house unless the husband caught a ride into work. Most had two or three children, usually about two years old and less. Some of the wives were pregnant with a third child, and the majority were under twenty. Their

concept of the landlord was grim at best. He would do nothing if requested to make a repair and would only threaten legal action if the tenant complained. Most couples arrived at the trailer park as a last resort for desperately needed, affordable housing. Many wives had not finished high school and despaired of getting employment to supplement their family's income. The OUTREACH Coordinator faced a difficult task, seemingly an insoluble one.

One approach to solving the alienation problem felt by all the resident wives was to tour the military facilities on an Army bus, demonstrating that the Army did care about people. The visit included trips to the commissary, post exchange and hospital facilities, as well as the Thrift Shop, an activity which received rapt attention from the visitors. The culmination of the trip was a visit to the historic quarters of the commanding general, conducted by the general's wife. The personal interest of the commander's wife made a strong impression on the visiting wives, again because of the personal approach she made to each of them. The visit also inspired activities, because the young women learned of the exercise classes at one of the post gymnasiums. The positive impact of the personal approach, plus the need for the most basic information on the Army facilities cannot be overemphasized. The OUTREACH Coordinator consistently emphasized the aspects of things that could be done, rather than reinforcing the sense of isolation by reciting a list of could not's". After the initial tour, much of the women's feelings of isolation disappeared, and they were ready to begin organizing the neighborhood.

The OUTREACH Coordinator first encouraged a visitation committee to perform an important function, opening communications among the tenants and between the tenants and the landlord. First contact with the wives was a pragmatic consideration, since they were at home during the day, but Rothman confirms that most community participants are women who belong to voluntary groups and want to help others, among other characteristics.

We intended the program to focus on the military wife, and it is encouraging to find the principle validated in research. Further, it is significant to note the differences in our target population, in that they did not necessarily have much social participation, nor had they been long-time residents of the neighborhood.

"The concept of community is highly complex, multifaceted, and indeterminate." Rothman succinctly describes the problems the OUTREACH Coordinator faces when attempting to assist the community in an action project. Occasionally, the problems may be so manifold that no one knows where to begin. The residents pointed out the playground in the trailer park as a problem area. It was littered with trash and broken glass, the swings and slides were rusty and the grass was nearly waist high. The tenants had little expectation of remedying the situation, since they lacked both materials and money. The landlord had money, but lacked the

labor needed to pursue the project. The OUTREACH Coordinator overcame the tenants' reluctance even to ask the landlord for help, and when they did ask, the tenants were pleasantly surprised. The landlord provided mowers, paint and brushes at no expense to the tenants. He was also pleased that he could get that much free labor. Six couples from the trailer park spent two days of a weekend cutting, edging and painting. They were pleased with their immediate results, thereby confirming another trait noted by Rothman: low income participants are more interested in activities that have direct, immediate benefits. In addition, the OUTREACH Coordinator encouraged the wives to visit others who had not yet become involved in the community action. The security committee sponsored a briefing on home and self protection. Actions planned for the future include a lawn contest to improve the exterior appearance of the lots, fire inspection by the city fire department and leadership training for the committee chairpersons.

In conclusion, community action to develop a neighborhood is strongly influenced by the climate of that neighborhood. The OUTREACH Coordinator is invaluable, for she provides the link between the military facility and the population served. Information is also vital, because wives of junior service members may be intimidated by an unfamiliar environment and by their own age and inexperience. The OUTREACH Coordinator encourages the tenants to attempt projects they might otherwise never try, to build confidence with short-term tangible results. Future implications of the OUTREACH Program are significant: both the service members and the local community benefit from the improvement in living conditions. And the Army benefits by having more committed soldiers.

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A Look At Job Satisfaction

CPT Michael J. O'Brien
Womack Army Hospital

In working with General Organization Questionnaire (GOQ) information, frequently I ponder the importance of a particular index and wonder how user planning and implementation around one index is really related to what the user wants as a final outcome. The I.S.R. Casual-Flow Model does describe general causes and flow, yet the bottom line may very well be identifying some key areas from among many causes, which if improved, could be expected to secure the user's desired result.

As an OESO I find information valuable which improves the probability of the user system getting the best return for the investment of resources.

The particular end result examined in this presentation deals with job satisfaction. This was selected as an end result for several reasons: 1) sometimes this is selected by users as a desired outcome in applying the 4-step process, 2) the GOQ does address job satisfaction with a direct question, 3) job satisfaction is an individual perception and 4) other ends results such as combat readiness require demonstrating relationships with other indicators which in turn must be demonstrated to have a relationship with combat performance.

METHOD

This study used some 625 cases of GOQ data from a half dozen different organizations on Fort Bragg. GOQ question 70, "All in all, I am satisfied with my present job," was selected as the most accurate expression of job satisfaction. The five standard degrees of responses for question 70 were crosstabulated with the five degrees of responses for other questions, arbitrarily selected for analysis based on the author's interests and suspicions. These crosstabulations were then checked for a chi-square value to determine if a relationship was demonstrated on the table and checked for a τ_b score to determine the strength of the relationship shown. (This was accomplished by using a programmable calculator.) The following table is an example of the crosstabulation of GOQ question 73, "All in all, I am satisfied with my unit," with job satisfaction:

All in all, I am satisfied with my unit

STRONGLY	DISAGREE	NEUTRAL	AGREE	STRONGLY
27	10	9	8	1
3	20	13	17	4
1	6	21	23	10
0	5	14	100	35
4	5	9	53	204

STRONGLY
DISAGREE
NEUTRAL
AGREE
STRONGLY

J
O
B
I
O
N

The chi-square score for this table and all the tables examined were sufficiently high to indicate that some relationship exists. The τ_{ab} score for this table is +.6098 indicating an extremely strong relationship exists between the responses to these two questions. The number may be thought of as the percentage of increase over a 50/50 probability in predicting how a person answered one question based on knowing how he answered another question. So, based on knowing how a person indicates his degree of job satisfaction, I could guess and expect to be correct 80% of the time on how he would indicate the degree of satisfaction with his unit. Generally, a τ_{ab} score of .3 or higher is thought to indicate a significant relationship while lesser values are thought to indicate minor to moderate relationships.

RESULTS

This table summarizes the various questions compared with job satisfaction in descending strength:

<u>tau</u>	ITEM No.	QUESTION
.6098	73	All in all, I am satisfied with my unit
.4905	80	This unit recognizes a person for what he/she does and not just by favoritism
.4831	8	I get a sense of accomplishment from the work I do
.4716	74	All in all, I am satisfied with my career in the Army
.4682	9	I look forward to coming to work every day
.4315	78	I know what I have to do to get recognized for doing a good job
.4183	76	I receive fair and objective efficiency reports in this unit
.3990	14	My performance evaluations and efficiency reports have been helpful to me
.3870	58	I understand what is expected of me on my job
.3660	40	My supervisor gives clear instructions when he assigns a task

.3599 33 When there is a disagreement, my supervisor encourages the people who work for him/her to openly discuss their differences

.3521 56 Information important to our work is widely exchanged within my work group

.3478 36 My supervisor encourages us to give our best effort

.3473 57 My work group plans together and coordinates its efforts

.3397 21 My unit is willing to try new or improved methods of doing work

.3342 44 My supervisor is able to be heard by and influence those above him/her

.3320 28 My supervisor lets me know when I have done my job well

.3237 51 Open and honest discussion is used when we are making group decisions

.3139 29 My supervisor makes it easy to tell him/her when things are not going as well as he/she expects

.3018 1 The information I receive down through formal channels is generally accurate

.2911 49 My co-workers encourage each other to give their best effort

.2820 34 I know what my work group is trying to accomplish

.2781 59 My work group is able to respond on short notice to heavy work demands placed upon it

.2688 10 I want to contribute my best efforts to the unit's mission and my assigned tasks

.2641 5 Decisions are made in this unit at those levels where the most adequate information is available

.2572 46 My co-workers tell me when they think I have done a good job

.2508 3 Work priorities are established in line with the unit's objectives

.2201 6 Decisions are made in this unit after getting information from those who actually do the job

.2187 31 It is easy for me to get in to see my supervisor

.2169 2 I get all the information I need about what is going on in other sections or departments in my unit

.1900 7 People in my work group work hard

.1594 27 This unit is able to respond to all demands put on it to accomplish its mission

WHAT DOES IT ALL MEAN

I do not intend to suggest that my interpretation is the only interpretation, or even that it is correct. I do know that these results started me thinking about what this could mean.

1. Question 73 suggests that how a person talks about his unit is a reflection of how satisfying his job is.

2. Items which have a very significant impact on job satisfaction include issues in Herzberg's motivators. Key relationships include receiving recognition, having a sense of accomplishment in doing the job and having pride in one's career.

3. Items having limited impact on job satisfaction included 2 of the GOQ readiness questions on mission and work demands, questions on decision making and some questions about co-worker interaction.

4. Specific areas of importance, in the order of importance, for job satisfaction that a user might focus on include:

A. the award and recognition systems

B. OER's, SEER's, EER's and performance appraisal sessions

C. Do supervisors give clear expectations, clear instructions and develop and maintain an atmosphere where differences can be discussed?

D. What improvements can be made with communications inside the section and with the supervisors?

This has been a brief review of some relationships between GOQ questions and job satisfaction. I'm comfortable that it indicates some priorities for users at Fort Bragg to get a good return on job satisfaction for their efforts in improving certain organizational processes. I recognize that whether these same relationships exist at other posts or even still exist at Fort Bragg is debatable. But the thoughts these findings generated are now part of the many things to carry into contact with a user.

RETO, OE, and OECS - Where Do They Stand?

**CPT Ronald C. Sims
Training Developments
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The OECS has been heavily involved in areas which will have long-lasting and a profound effect on OE in the Army. The center is implementing some of the recommendations made by the Chief of Staff's Review of Training for Officers (RETO) study in 1978.

The RETO study recommendation is several volumes thick and recommends a complete revision of officer education in the Army. The recommendations, familiar to most officers, involves the modification of advanced courses, redesigning CGSC to a CAS³, and long course, and more "job specific" TDY training courses.

However, there are more aspects than those just mentioned. All TRADOC service schools (including OECS) are being asked to prepare listings of all tasks which are common and job specific by specialty, to company grade (01-3) and field grade officers (04-06). For OECS this meant identifying tasks which are common to all company and field grade officers.

Most TRADOC service schools received proponency for some common and job specific tasks. At OECS, we received proponency for common tasks that were in the areas of:

- Communications
- Human Relations
- Counseling
- Supervision
- Decision Making
- Management Sciences
- Planning
- Ethics

Since we are not a specialty-producing school (i.e., 41, 42, 53, 11, etc.), we do not have job specific proponency for any task.

Under RETO all the common tasks will be combined into programs of instruction for officer training at all levels and career assention points. The proponent school will be responsible for developing the POI's in their proponency areas for dissemination to the other TRADOC schools to use in their various courses.

As can be seen, this is a massive project with a projected completion date in 1985. We at OECS have proposed 82 tasks for which we must eventually develop methods for training officers to accomplish those tasks to meet certain standards.

MILPERCEN and the Training Developments Institute (TDI) at TRADOC are also conducting surveys in company grade tasks to determine if these tasks are actually performed by lieutenants and captains, and how much of their time is spent accomplishing the tasks. OECS will eventually be provided with this information in order to modify the task we feel company grade officers need to know in our areas. Eventually, surveys will be conducted for the field grade common tasks in order to validate them also.

Also, under RETO guidance, many service schools are conducting interviews (in conjunction with survey data) with selected officers in various positions to determine what they actually do. This information will further help them to refine their tasks in order to develop the best instructions for the essential tasks in their areas.

OECS decided to look at what the OESOs throughout the Army are doing, what skills they use, and what are the attributes (competencies) they need to possess. This desire was partly driven by RETO (eventually, we will have to determine competencies for 5Zs) and by our own concern for training OESOs in the most current skills and applicable competencies.

To do this, OECS contracted through ARI with McBer and Company to develop the competencies OESOs need to possess. This contract is a year-long effort through June 80. McBer and Company distributed to OESOs surveys which are intended to find out what OESOs do and the time they spend doing it. In conjunction with the surveys a random section of OESOs will be interviewed by folks from McBer and Company and by personnel from OECS. Again, this is to further validate what OESOs do and don't do.

From all this data Training Developments Directorate will develop an OESO competency model. From this model, we will know what skills and knowledges OESOs need to possess to successfully accomplish their jobs. Therefore, we can develop more realistic training to develop the OESO competencies.

Recognizing that OESOs are bombarded with surveys and interviews, we hope you will "bear" with us as you answer surveys and are involved in interviews. The results will be more than worth the effort, OE technology being taught and used by all the service schools; a more appropriately trained OESO; and thus a more effective Army.

OD/OE in the 1980's

**LTC(P) Don Van Eynde
Bob Goodfellow
OECS**

As this decade comes to a close, one of the most intriguing and important questions which our civilian counterparts are trying to answer is, "What trends, problems and issues will emerge in the field of organizational development during the 1980's? Since the development of OE appears to be inextricably linked to new initiatives in the OD sector, the answer to that question is of equal importance to those of us in the Army.

Certainly no one to date has been able to predict with total accuracy what will occur in the future; however, as most organizational planners will attest, there are definite benefits to be derived from an attempt to forecast future trends--at least in a near timeframe. One of the forecasting techniques used by futurists is the Delphi¹ method, which involves consulting with experts in the field of interest. (The name may be amusing to some of you history buffs since the oracle of Apollo at Delphi is noted for its ambiguity.)²

¹ From workshop, "New Eyes: The Role of OD in Alternative Futures," by Susan Isgar, OD Network Fall '79 Conference, Sep 8, 1979, Snowmass, Colorado.

² Urdang, L. & Flexner, S. (eds.), The Random House College Dictionary, 1973, New York: Random House, Inc., p. 352.

The Delphi method was used recently by Dr. John Jones, Senior Vice President, University Associates, and several of his UA colleagues in an attempt to forecast what might happen to OD in the 80's. Initially leading OD practitioners and researchers in the United States³ were queried concerning their individual forecasts of the three most significant areas of interest for the OD practitioner in the 1980's. The questionnaire on the following pages resulted from their responses. The next step was to have the experts themselves answer the questions.

Interested in what the experts had to say? Curious as to whether your answers, based on your own field experience, would be close to theirs? Since it was a fun experience for us, we encourage you to take five minutes and complete the questionnaire before reading on. By the way, there are no right or wrong answers, so resist the temptation to peek ahead at what the experts said. (There's no hope for those of you that open presents early!)

³ Experts who participated in the Delphi process are listed by name on the concluding page of this article.

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OD in the 80's

Morris Spier, Leonard Goodstein, Marshall Sashkin, John Jones

The following items were derived from a survey of leading OD practitioners and researchers in the United States. These persons were identified because of their extensive publications in the field and/or because they manage large-scale OD projects.

EMERGING TRENDS

Directions: Rate each item by circling the response that best reflects your opinion about whether that trend will actually materialize.

- 1 - highest likelihood, almost certain to occur
- 2 - high likelihood, a strong possibility of occurrence
- 3 - moderate likelihood, a possibility of occurrence
- 4 - low likelihood, an improbability of occurrence
- 5 - lowest likelihood, almost certain not to occur

1. Integration of OD, career planning, and career development.	1	2	3	4	5
2. Greater utilization of OD to increase profitability.	1	2	3	4	5
3. Development of OD technology for dealing with scarce resources in the context of economic and ecological turbulence.	1	2	3	4	5
4. Utilization of OD in strategic planning and long-range forecasting.	1	2	3	4	5

5. Applying OD to large, geographically dispersed organizations -- macro-system intervention.	1	2	3	4	5
6. Increased emphasis on "systems" approaches to OD.	1	2	3	4	5
7. Growth of OD in international, multinational, and multi-cultural settings.	1	2	3	4	5
8. Development of OD applications of nonrational ways of knowing (right-brain/left-brain theory).	1	2	3	4	5
9. Emphasis on holistic health and stress management.	1	2	3	4	5
10. Increased use of contingency theories of motivation by OD practitioners.	1	2	3	4	5
11. More concern with quality-of-work-life issues.	1	2	3	4	5
12. Unifying and codifying OD theory and practice, including the integration of various approaches to organizational change.	1	2	3	4	5
13. More emphasis on OD efforts to achieve sustained, long-term change.	1	2	3	4	5
14. OD's move into new domains -- health-care institutions, the public sector, the political scene, etc.	1	2	3	4	5
15. More emphasis on comprehensive, broad-scale interventions.	1	2	3	4	5
16. Development of more effective and systematic methods of organizational diagnosis.	1	2	3	4	5
17. More concern with issues of organizational power and influence.	1	2	3	4	5
18. OD as more and more a line manager's function.	1	2	3	4	5
19. OD becoming more integrated with traditional management training, human resources development, and personnel functions.	1	2	3	4	5
20. An increased emphasis on organizational design.	1	2	3	4	5
21. An increased use of OD to integrate women and minorities into the organization.	1	2	3	4	5

PROBLEMS AND ISSUES

Directions: Rate each item by circling the response that best reflects your opinion about each item's importance as a potential problem.

- 1 - almost certain to be an important problem
- 2 - probably will be an important problem
- 3 - possibly will be an important problem
- 4 - improbable that it will be an important problem
- 5 - almost certain not to be an important problem

22. Resolving the dilemma between OD values and "bottom-line" concerns.	1	2	3	4	5
23. The measurement and documentation of OD impact.	1	2	3	4	5
24. Dealing with the faddishness of OD.	1	2	3	4	5
25. Dealing with the poor quality of OD practice and practitioners and inadequate quality control.	1	2	3	4	5
26. The impact of economic uncertainty, energy shortages, and general environmental turbulence.	1	2	3	4	5
27. Unifying the theory of OD.	1	2	3	4	5
28. The changing nature of workers and their motivation to work.	1	2	3	4	5
29. The internal management of OD in organizations.	1	2	3	4	5
30. Increasing the credibility of OD.	1	2	3	4	5
31. Developing a theory-based practice of OD.	1	2	3	4	5

Okay, now let's look at how the experts answered it. Above each of the possible answers to each question is the frequency response -- the number of experts which selected that particular choice. (The highest total frequency for any question in the Emerging Trends Section is 39. One of the experts said that the trends were dependent on how consultants resolved the problems and issues, so he chose to answer only questions 22-31). For ease of comparison, we suggest you tear out the questionnaire you just completed and place it alongside the frequency response key which follows. (Besides, we're going to ask you to do that anyway as soon as you've finished your comparison).

FREQUENCY RESPONSE KEY

Each question was rated on a scale of 1 to 5. The frequency with which each rating was given to a particular question is shown to the right of that particular question.

QUESTIONS 1 - 14	FREQUENCY OF RESPONSE				
	(1)	(2)	(3)	(4)	(5)
1	2	17	11	6	2
2	13	12	8	5	1
3	5	11	7	15	1
4	4	18	9	7	1
5	10	9	11	7	2
6	19	11	4	3	1
7	13	12	7	3	2
8	1	9	16	9	4
9	3	15	16	2	2
10	9	10	10	9	1
11	5	14	11	6	2
12	15	14	6	2	2
13	11	16	7	5	0
14	12	17	6	2	2

QUESTIONS 15 - 31	FREQUENCY OF RESPONSE				
	(1)	(2)	(3)	(4)	(5)
15	5	18	11	3	2
16	8	19	7	5	0
17	11	15	10	3	0
18	10	9	15	5	0
19	11	8	15	2	3
20	11	17	7	3	2
21	5	17	10	7	0
22	18	9	5	6	2
23	10	13	12	5	0
24	6	12	9	10	3
25	7	16	10	4	3
26	11	6	14	7	2
27	7	12	11	9	1
28	8	14	12	5	1
29	7	14	13	2	3
30	7	18	11	2	2
31	12	8	11	7	2

How closely did your answers compare with those of the experts? Our guess is that they correlated pretty well as our experience suggests that Army consultants are pretty much in agreement with the opinions of leading civilian practitioners. We're really interested, however, in where significant differences exist -- especially as signified by those of you out there actually doing the work. Since the same questionnaire was also administered to practicing consultants in attendance at the OD Network Fall '79 Conference, we'd like to compare your answers, not only with the experts, but also with your civilian counterparts in the field. Those data will be beneficial in determining which, if any, significant differences exist in the practice of OE versus OD, and may be of value as we continue to revise

the course curriculum here at OECS. So, here's a request -- if you haven't already done so, please tear out the questionnaire you completed, write in at the top whether you're stationed in CONUS or overseas, which OE course you attended, and mail it back to Bob Goodfellow at OEC&S. As soon as the results are in and the comparisons made, we will feed back the data to you in the next issue of the OE Communiqué. We will also share your results with Dr. Jones of University Associates, who graciously gave his permission to use the UA instrument.

Your data (if you act quickly and get it to us on time) will be made available to attendees to the University Associates OD '80 Conference in March. This conference derives its topics and theme from the interim results of the questionnaire you have just read. The final report of the completed Delphi will be presented at the conference. This may be a good professional development experience for you if thinking about the future of this business catches your fancy. And since the conference is being replicated in three locations (New York, San Diego, London) most should be able to find a convenient date and location. Check your mail for conference specifics.

For those of you who were not fortunate enough to attend the OD Fall '79 conference, we'd like to include this article with a summary of Dr. John Jones' ⁴ remarks on how he personally views what could happen to OD in the 80's:

...What should we be paying attention to in the 80's? If the survey results are any indication, OD persons will become more involved with operational problems, working for long-term change and conducting more large systems interventions. They will also be focusing more in the coming decade on issues of power and influence, stress management and large-scale planning activities.

...The outlook for OD in the 1980's is bright. One solid indicator of this is that the subject of OD has become academically respectable. An increasing number of line managers taking courses in our nation's universities are being exposed to the concept, and there is an increasing acceptance of the use of OD technology within organizations. So, although it may have a somewhat different appearance than it does now, OD will be around in the 80's.

...Although the outlook is bright, there may be some cutback in the number of consultants if the economy continues to worsen. In times of hardship persons involved with human services are often the first to go. What will hopefully happen is that those who are not doing a good job will be weeded out of the system and the remainder will stay.

...There will always be a market for OD; however, the potential for its use is tremendous. Many of the smaller industries, which really have a need for such technology, are not yet aware of its potential.

⁴Excerpted from concluding keynote speech by John E. Jones, OD Network Fall '79 Conference, Sep 11, 1979, Snowmass, Colorado.

...What are the implications for OD practitioners in the 80's?

1. Read a lot. Don't feel guilty about shutting your office door and reading a book on OD. There are benefits to be derived for both you and your organization. Keeping up to date is part of a professional's job.
2. Conduct research, be data-oriented. The experts believe that the dilemma between OD values and "bottom-line" concerns must be resolved, and this is one way you can do that.
3. Increase sharing amongst each other. Take advantage of the ideas and expertise of other OD practitioners and give them the benefit of your experience.
4. Collaborate with others. Talking to trainers, managers, computer folks, etc., increases your own expertise and insures a more solid product for the organization.
5. Question your values and truths. There's a strong tendency for persons such as OD practitioners, psychologists, TA people, etc., to tend to reify their own disciplines and ignore others.
6. Be proactive. We must be the ones to do it. Managers won't shape the course of OD in the 80's and neither will academicians. We must make OD go in a way that is productive.

We sure hoped you liked those words. They were music to our ears.

So what does all this mean to the individual OE consultant? To us it looks like introspection time again...time to see where you stand on each of these issues. Once you decide, then chart a personal course of action that provides about a ten percent professional stretch. Extending yourself may be necessary to keep up with the crowd!

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The Reserve Components: A Giant

**MAJ Boynton
MAJ M. Macaluso
SGM R. Fischer
6th Army**

Imagine an OD client whose organization works together only 38 days a year, attempting to meet the demands of a fulltime environment and modern technology. He or she wants to improve communications, clarify goals, action plan, assess reasons for personnel turbulence, develop leadership training programs and top it off with some time management improvement. He'll give you 12 days, in two day increments one month apart to accomplish the four step process, and his organization is 1000 miles from where the OD consultant is headquartered. Sounds like a piece of cake!

Now imagine the organization to be military, with all the administrative, logistical, training and operations demands on it. Also, its an element in over half the strategic force we are counting on to win the next "come as you are" war. Is this what they had in mind in telling us about the real world?

With this flavor for OE in the Reserve Components, this article will highlight aspects of the Army Organizational Effectiveness program as applied to Army Reserve and Army National Guard organizations by looking at some of the unique people and problems associated with what we see as a "giant." The term "giant" describes the potential associated with doing OE activities in an environment which is relatively tradition bound but which eagerly grasps opportunities to improve efficiency and maximize the short time available to work together.

People

The variety of people is amazing. Advisors and assisters from the Active Component cover the full spectrum of Army personalities. Generally, they are the cream of the crop at both officer and NCO levels. Besides the advisors, a small full time "technician" force handles administration during the month when Guardsmen and Reservists are hard at work in their civilian professions. The technicians keep commanders and principal staff officers informed between drills. Most technicians are dual status which means they are also military members of the unit in which they work, and, as a group, form an interesting "separate, yet integral" sub-organization in the RC structure.

The reservists (hereafter referring to both National Guard and Army Reserve members) themselves serve for a variety of reasons and all bring skills from civilian employment and usually past active military experience to the unit. For the most part one sees the talented person who has adapted and managed his life so he can juggle the concerns of family, job, and military service.

Organizational Effectiveness is a term with which many reservists are unfamiliar although many quickly associate it with some type of OD effort that took place in their civilian job environment. Also, since most reservists attend Army Service schools the TRADOC classes on OE are having an impact in the field, a great assist when entering a unit. Totally different from the Active Component is the fact that many individuals may have served together for many years. Relationships run the gamut of being totally supportive, fraternal and warm to entirely fragmented with internecine power struggles, conflict and smugness sometimes overriding critical unit missions.

Personnel strength problems plague Reserve Component organizations to an even greater extent than units in the Active Component and are related to leadership, training, quality of work life, lack of clear goals or action plans, or issues unique to the unit. Transitions take longer (and the value of a transition workshop soars) when there is little time to sit down and get to know your people, much less manage them. A typical State Adjutant General has twelve different personnel management systems to which he is accountable: a matrix of state, federal, military, civil service, officer and enlisted, Air Force and Army programs.

The Army's strategic plans offer little slack. These organizations are expected to be ready to mobilize. Principally due to their own competence and the dedicated advisors, many RC organizations are ready. Given the resources, many more could be.

One of the resources in short supply is OE. Officers and NCOs at CONUSA have been working for several years with probably the most interesting, varied and geographically dispersed clientele as any consultant. In Sixth Army, the 15 separate major National Guard organizations and 7 major Army Reserve Commands, not to mention the CONUSA headquarters itself, two Army Readiness Regions and six Readiness Groups.

For an OESO assigned to work with the RC, airports become very familiar. "Designing on your feet" is a way of life. The client may be an engineer, a clergyman, a lawyer, a TV newsman, or a corporate executive whose job includes hiring and firing OD consultants! Always, the time constraint presses on the Commander and the OESO to do it fast. The standing joke is that a list of competencies for the OESO working with the RC would have to be topped with the ability to "chalk cues before landing."

The Army has only about a dozen OESOs dedicated to supporting the RC. The assignment of CPT Paul Trahan to Readiness Group, Fort Lewis, is an encouraging first step in the right direction. During the next year, more OESOs will be assigned to Readiness Groups, and the National Guard Bureau will establish three regional centers nationwide to provide OE support to Guard clients. Even these additions may not be enough, if OE is to be institutionalized and become credible.

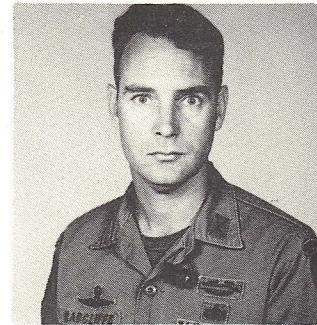
In summary, the diverse, sophisticated clients of the Reserve Components cannot necessarily use all Active Army programs just because they seem to work on the full-time force. On the other hand, the OE that has been implemented in the Reserves has, according to the clients themselves, been very beneficial. To properly address the Army macro-system, we're simply going to have to commit a lot more resources to developing tailored approaches for Reserve Component organizations. We like to think that the giant is ready and willing to accept OE. We can't afford to ignore such a major portion of our strategic force. Have you visited your affiliated or round-out units lately?

*Theory
and
Practice*

Transition Methodology - Our Most Effective Tool For Encouraging Commitment

**MAJ Robert F. Radcliffe
CPT Raymond P. Drummond
OESOs, 25th Inf. Div.**

Major Robert F. Radcliffe graduated from USMA in 1965 and commissioned Infantry. His assignments include duty with the 101st Airborne Division, the 1st Cavalry Division, 46th Special Forces Company, USMA, and the 25th Infantry Division. He is a graduate of the Command and General Staff College and possesses a Master of Education degree from Georgia State University. He is currently Executive Officer of the 1st Battalion, 35th Infantry, 25th Infantry Division.



Captain Raymond R. Drummond graduated from USMA in 1971 and commissioned Infantry. His assignments include duty with the 82d Airborne Division, Infantry Officers Advanced Course, OECS, and the 25th Infantry Division. He possesses a Master of Science degree in systems management from the University of Southern California. Presently serving as the OESO for the 25th Infantry Division.

All of us recognize the importance of first impressions when meeting and dealing with people. As OESO's the "first impression" that we make is normally the transition activity. Unfortunately in some number of instances, for one reason or another, this transition activity may not occur. The purpose of this article is to outline an approach that may increase the probability that a transition activity will occur, and that it will be successful. It is our hope that it will be of some use to you.

The first step in securing commitment to the OE process through a transition activity should occur long before the commander arrives in your organization. We use a formal letter of introduction with three inclosures that describe the transition model that we have found to be most effective in the Division. Our goal is for this letter and the

inclosures to be the most professionally done communication that the new commander receives from the Division. Our letter and its inclosures are included in this article for your consideration. In that they should be largely self explanatory, I will only add a point or two of clarification here. One, we attempt to make distinctions between the transition model presented to commanders in the Precommand Course and the model we use in the Division. Examples here are non participation by the outgoing commander and the compressed time period for the activity. Secondly, we attempt to provide the new commander with some points to consider as he formulated the manner in which he will communicate his command philosophy. These points represent issues what have surfaced at other transition meetings within the Division. The subtle message is: The OESO's in the Division have some experience in the Division environment and credibility with commanders already assigned, they are available to talk with you about the Division as a whole, and they are professionals.

During the past year as OESO's we have facilitated some 27 transition activities within the Division. This includes all incoming Battalion and Brigade commanders. With few exceptions these commanders have requested additional activities. We would like to feel that in some way this approach has contributed to the commitment of these commanders to the OE process.

One last thought, in recent months we have tailored the three inclosures for use with company level commanders in transition meetings. Because of constraints on our time we have trained our L&MDC instructors to facilitate the actual meeting with us sitting in only for the new commanders planning session.

Although preliminary in nature, our appraisal is that this technique is proving very helpful to these commanders, both in terms of helping them clarify their command philosophy, as well as easing entry into their new company.

SAMPLE

SUBJECT: Organizational Effectiveness Support

Dear _____

Congratulations on your selection to command in the 25th Infantry Division. By way of introduction CPT Ray Drummond, SFC Reginald Chavez and I comprise the Organizational Effectiveness Staff Element of the Division's G1 Section. The purpose of this letter is to offer you our services, with an initial goal of providing you assistance in planning and conducting a transition meeting as you assume command.

A Transition Meeting has three objectives: 1) to assist you in developing understanding of your unit, 2) to enable you to better and more quickly know your key personnel, and 3) to assist your top team to more quickly know and understand you. The overall purpose of the meeting is to reduce the anxiety and turbulence that accompanies a change of top leadership in an organization.

The general format in terms of an agenda that we have found most useful is shown at Inclosure 1.

There are two significant differences from the transition model you may have been exposed to in the Precommand Course. First, we have not involved the outgoing commander, and secondly, we conduct the meeting in one half day. We schedule the meeting immediately after your assumption of command (prior to internal staff briefings), and we hold it at a location away from the work environment. Inclosure 2 is a listing of typical topic questions used to focus discussion by all participants on organizational issues. Normally, the new commander picks from 6 to 8 of these appropriate to his needs. Inclosure 3 represents a list of significant issues in the work environment, social, or personal area identified for discussion in previous transition meetings in the Division. They are provided for your information and thought.

In short we feel the meeting format has done much to assist new commanders get off to a smooth start in command. Please understand it is simply a recommendation in terms of its format. We encourage you to stop in and discuss it with us after you arrive in Hawaii. We feel confident that the meeting will result in a product oriented to your needs. Should you wish to contact us prior to your arrival our AUTOVON No. is 455-0594. In Hawaii our numbers are, 655-0584, 4001, or 4002.

Once again congratulation on your selection to command in the Division. We look forward to meeting you.

All the Best!

ROBERT F. RADCLIFFE
MAJ, GS
OESO

RAYMOND DRUMMOND
CPT, GS
OESO

REGINALD CHAVEZ
SFC
OENCO

AGENDA

1130-1230	Lunch	All participants
1230-1240	New CDR's Introductory Comments	New Cdr
1240-1250	OESO Opening Comments	OESO
1250-1330	Introduction Exercise	All
1330-1550	Discussion of Topic Questions	All
1550-1600	Open Discussion - Work Environment Issues	All
1600-1630	New Cdr's Philosophy	New Cdr

TOPIC QUESTIONS

(Focus Dialogue on Organizational issues)

1. What the new commander needs to know about me is...
2. My single greatest concern at this time is...
3. The thing(s) that get in the way of my doing my job better are...
4. The changes that need to be made to help me are...
5. What the new commander can do to help me is...
6. What requires the immediate attention of the new commander is...
7. What the new commander needs to understand to work successfully for the Brigade and Division commanders is...
8. Policies, procedures and issues unique to 25th Infantry Division life the new commander should be aware of are...
9. What my unit/section does best is...
10. What my unit/section does least well is...
11. Support I need from Battalion is...
12. What I consider my unit/sections top three priorities are...
13. What I consider the Battalions top three priorities are...
14. Are goals and priorities clear and realistic...
15. Do we plan and anticipate well.
16. Is there an atmosphere of open and honest communications.
17. Do we communicate well...
18. How is conflict managed...
19. How is your morale, your team's morale...
20. What have I not asked you that I should have...

INCL 2

ISSUES REQUIRING CONSIDERATION IN THE DUTY AND
SOCIAL ENVIRONMENT

GENERAL: The items listed below represent a synopsis of issues that have surfaced in previous transition activities within the 25th Infantry Division. Accordingly they are presented for your consideration as you prepare to assume command.

DUTY ENVIRONMENT:

Duty hours - Philosophy, personal schedule, should subordinate work when you do?

Time off - Who controls staff CDR's philosophy.

Access to you - For CDR's, staff, reporting procedures, who controls your calendar, action officers vs principles - How often do you want to see or talk to CDR's, staff? Calling you at home - groundrules?

Philosophy on leave - "Don't lose leave philosophy or not"

Prerogatives - Promotions you reserve, awards, punishment offenses.

Relationship to soldiers - Military courtesy, positive vs negative feedback
Philosophy on handling "bad" soldiers..

LEADERSHIP PHILOSOPHY:

OER's, SEER's, EER's - Philosophy and understanding of the system. Include role you see in monitoring submission by subordinates.

Competition within the Bn - Philosophy

Decision making - Actions desired by subordinates when they think you are making a mistake. Differentiate between period when negotiation is legal vs loyalty to decisions made.

Information - Philosophy on your desire to be kept informed vs overinformed. Feeling regarding problem communication vs problem communication with recommendations.

Integrity and Ethics - "Gamesmanship" vs strict integrity in reporting. What should subordinate do if he perceives you have placed him in an "ethical crunch"?

Supervision - How will subordinates know if you are dissatisfied. How will subordinate know when you think something is important? Training vs performing - will you be clear when failure is unacceptable? Why do you inspect...

Off duty conduct - Philosophy on membership in Officers Club, Div Assn, AUSA. Contribution to AER, CFC, etc. Conduct and decorum, off duty education.

Athletics - Philosophy on support to same vs mission.

Officer Role - Philosophy

NCO Role - Philosophy

PERSONAL APPRAISAL:

Temper - Do you have one, what should subordinates do if you lose same...

Pressure - How will you react to or handle same...

Sarcasm - Will you communicate with sarcasm, are we likely to misunderstand same?

Formality - In dealings in office, around troops, in the field.

Ideosyncracies - Do you have any others?

SOCIAL:

Spouse - How should subordinates address her? Their wives address her.

Yourself - How should your subordinates spouses address you?

Drinking - Do you? Any feelings on same?

"Command Performances" - Do you visualize there being some? How will your subordinates know you feel an affair is a "Command Performance".

"Happy Hour" - Philosophy

OE/OESO Interface with BTMS

**MAJ James H. Jackson
Chief, Concepts and Studies
USAOECS**

The Army's basic purpose is to win the land battle. We cannot accurately foresee the time nor place of that battle, but we must expect to face a well-armed enemy, superior in number. We cannot count on either a long mobilization nor a lengthy war. Rather, we must ready ourselves for early, costly, intense combat in which the penalties for poor training will be high casualties and defeat. Training must provide for readiness in peacetime, swift reinforcement in the event of war, and rapid mobilization. The effectiveness of our training will determine the outcome of the war.

The standard training management system for FORSCOM units is the Battalion Training Management System (BTMS); the Army Training Board (ATB) is the proponent of this system. The ATB is the standardization agency on training management within the TRADOC school system. The ATB also conducts seminars and workshops for units to teach BTMS to unit leaders.

Standard elements of BTMS are:

1. The Executive Seminar: A 2-hour briefing presented to the chain of command above battalion level.
2. The Training Management Workshop (TMW): Designed for the battalion commander, the training staff and company, battery or troop commanders.

3. The Platoon Trainer's Workshop (PTW): Designed specifically for platoon leaders and platoon sergeants.

4. The Trainer's Workshop (TSW): Conducted to provide the first line supervisors - the squad leader, section chief, tank commander, etc., in the unit - the necessary training skills and confidence to prepare and conduct performance oriented training.

5. The Training Supervisor's Workshop (TSW): Developed and presented to emphasize the role of the CSM and 1SGs in supervising training while performing their other duties. This design for BTMS attempts to get at the crux of the training problem Army-wide in that it facilitates what General Starry refers to as "sergeants' business." The responsibility for individual training is that of the first line supervisor. Additionally, BTMS works hand in hand with the other training tools available at battalion level. Some of the tools are the ARTEP, SQT, soldiers' manuals, commanders' manuals, etc.

BTMS addresses the quality of training and training management, which is a complex problem. Those of us in the business of helping units become more effective with the ultimate objective of closing the "gap" between our Army and that of the potential adversary are certainly familiar with the model depicted below:

- one echelon at a time	HOW IT IS OR PERCEPTION	HOW IT SHOULD BE OR IDEAS ON ...	- Realistic
- Unrealistic	OF ...		- Focused on mission and men
- Focused on me			- Well planned
- Uncoordinated/ confused			- Based on clear objectives (task, condition, standard)
- Not well planned			- Performance oriented
- Based on fuzzy guidance			- Decentralized
- Time oriented			- Multi echelon
- Centralized			- Coordinated

THE HOW IT IS/HOW IT SHOULD BE "GAP"

The how it is/how it should be "gap" exists in all units. The question becomes, "Can the 'gap' be narrowed?" The answer must be yes and OESOs can and will play a very important part in making a smaller "gap" in training and in making the Δ (Delta) smaller when we consider the calculus of battle.

Established goals for unit training programs, coupled with the training management model, are the tools with which the training "gap" can be narrowed. Specifically, the goals for unit training programs are:

1. Accelerate the development and use of junior leaders.
2. Insure the productive use of the full training day of each soldier.
3. Improve individual proficiency in the tasks set forth in relevant soldiers' manuals.
4. Improve unit proficiency in tasks set forth in relevant unit Army Training and Evaluation (ARTEP) manuals.

The Training management Model is almost synonymous to our O-M-R model in that objectives are established, methods identified, and resources identified and matched. This model specifies four areas:

1. Set objectives.
2. Provide resources.
3. Coach subordinates.
4. Measure results.

After members of the Army Training Board visited OECS in November 1979, MAJ Jackson, CPT(P) Hawks, and SFC Konarik visited Fort Hood, Texas, for the specific purpose of observing the implementation of BTMS and to look for lucrative and productive OE interface opportunities. The individuals above observed actual BTMS training and interviewed numerous OESOs, senior commanders, staff officers, and BTMS team chiefs. The result of these activities were numerous recommendations to the Commandant, OECS.

Specifically, the recommendations and some of the on-going activities at OECS are:

1. Assistance to the BTMS cadre in assessing the need for BTMS training. This recommendation carries with it some other ramifications. The tools for this type of assessment must be developed and placed in the hands of field OESOs. In an effort to meet this need, Mr. Stanchfield and Captain Price have been asked to develop specific interview questions and a survey instrument to accomplish this assessment. Additionally, through the above-mentioned interviews, it was discovered that in some divisions the requirement exists for each new battalion commander to go through BTMS within sixty days after assuming command. This then leads to the question of "Why not tie the BTMS need assessment to the transition model?" That is, the

OESO in doing his pre-transition work, could also assess the need for specific BTMS training.

2. Coupled with the recommendations in 1 above, the OESO could be of tremendous assistance in tailoring the BTMS modules to fit the specific needs of the battalion commander.

3. Field OESOs should become conversant with BTMS and, as a minimum, become experts on the design and application of the Training Manager's Workshop (TMS).

4. BTMS instruction should be integrated into the 16-week OESO course.

5. OESOs can train the BTMS cadre in design and facilitation skills (to include active listening, the use of "I messages," and in personal and performance counseling techniques).

6. OE/BTMS interface is limited only by the imagination and enthusiasm of the OESO and BTMS team chief.

Another exciting aspect of OESO involvement in BTMS is the possibility of further assistance to the battalion commander in combat-related areas. That is, the BTMS technology of planning, coordination, and commitment throughout the chain of command can be used to plan and implement specific training events such as ARTEPs, EDREs, SQTs, etc. Also, this type of involvement will foster the personal power of the OESO involved and increase acceptance of the Army's OE program.

In summary, BTMS is a very valuable tool for the Army and OESOs should be sensitive to the needs of the Army and address those issues that will assist in closing the "gap" between what is...and how we'd like it to be.

"GO FORTH AND TRAIN!"

Meeting Evaluation

**MAJ Warren Klein
CPT Dan Skaff
4th Inf. Div.**

One of the largest consumers of management time is attendance at meetings. Most organizations have established a schedule of recurring meetings, e.g., the "weekly staff" meeting, that are routinely attended by key members of the organization.

In addition to those attended routinely by busy managers, they often find themselves in other types of meetings that have been called for a variety of reasons, reasons that are often unknown to those in attendance.

Commanders and supervisors can reduce the amount of unproductive time that their key subordinates spend in meetings by considering a few basic steps prior to convening their next meeting:

I. What is the Purpose of the Meeting. This question must be answered clearly and specifically and reviewed at regular intervals to insure that the meetings are continuing to satisfy organizational needs. If the answer to this question reveals that the need for the meeting no longer exists or that more efficient means are available, then the meeting should be cancelled.

A manager may consider conducting a meeting for a number of reasons. Some of the more common are:

1. Sharing information.
2. Problem-solving.
3. Decision-making.
4. Socializations.

Ideally, meetings are held to save time in coordination by assembling, in one place, all of the people who need to share specific information. Time is wasted when the purpose of the meeting is not clearly presented to those in attendance. Time is also wasted if there is no effort to keep discussions focused on the purpose. The individual chairing the meeting must state in specific terms: (1) the goal (purpose) to be achieved; (2) the specific objectives of the meeting (problem-solving, decision-making).

II. Developing Criteria for Success

Once the purpose of the meeting has been clearly established, then criteria for success can be developed. The criteria emerge as answers to the following questions:

1. What input is necessary to accomplish the purpose?
2. Who are the people who can provide the input?
3. Who are the people who need the input?
4. What resources are available:
 - (1) Time
 - (2) People
 - (3) Meeting facilities

A meeting agenda, based on the meeting's purpose and criteria, can be established to insure success.

III. Meeting Evaluation

These steps can be applied to an evaluation of existing, regularly scheduled meetings as well as to meetings that are being anticipated. For example, the commander or manager can evaluate his or her existing weekly staff meeting in terms of the purpose that has been established, the people who regularly attend, the topics discussed and the degree of success that is achieved. Application of this process will help in determining if time is being wasted through:

1. Duplication of effort.
2. Meeting more frequently than required.
3. Presentation of information irrelevant to the stated purpose of the meeting.
4. Attendance by personnel who can contribute little or no input relating to the stated purpose.

IV. Alternatives to Meeting

The meeting evaluation process should include consideration of alternative methods to achieve the desired outcomes. If it can be determined that the purpose established for a meeting can be accomplished without meeting, then the purpose should either be reconsidered or the meeting cancelled.

Meetings are nearly always costly in terms of the resources that are devoted to conducting them. This process provides a simple yet thorough structure for evaluating an organization's meeting practices. It will also assist the commander or manager in determining how to accomplish traditional meeting objectives with the least investment of time. Subordinates who may also be experiencing their limit of available productive time will also benefit from this approach to meeting evaluation.

Case Study

Macro-Systems Action Planning

MAJ James E. Tate, Jr.

OESO

Arlington Hall, VA

BACKGROUND. In February 1978, the MACOM Reenlistment Officer conceived the idea of conducting a reenlistment conference with dual objectives of improving reenlistment program management and skill development for reenlistment personnel. The retention rate of the command was of great concern throughout the MACOM and there was a perceived adversary relationship between the MACOM Reenlistment Office and the unit Reenlistment NCOs compounding difficulties experienced with technical aspects of the reenlistment program. At the direction of the DCSPER, the scope of the conference was later expanded to include other difficulties experienced with military personnel management within the Command.

OESO involvement in the conference came in March 1978 when the Reenlistment Officer requested assistance in designing a communications and counselling block of instruction to be facilitated by the OESO during the conference. The training objective of the Reenlistment Officer was to expose Reenlistment NCOs to available tools which could help them retain more personnel and to develop their counselling skills. He was aware of the value to be derived from the experiential learning approach. Between March and November 1978, the OESO and OENCO designed a career counselling workshop, relying heavily on the content of a similar workshop developed for use in the 82d Airborne Division but also adapted information from a civilian consulting firm. The Reenlistment Officer was very enthusiastic about this workshop because it was a new tool that could be shared with the Reenlistment NCOs and he asked that it be presented experientially during the conference.

As conference time drew near and the scope was expanded in December to include participation by S1s/DPCAs as well as Reenlistment NCOs, the Reenlistment Officer requested OESO assistance in the design and facilitation of the conference. He, with DCSPER concurrence, decided to take a group problem solving approach to the conference rather than bringing people together from subordinate commands for a more traditional type conference. The initial concept had, by this point evolved into a modified OE-facilitated action planning conference sponsored by the DCSPER and coordinated by the Reenlistment Officer.

ODCSPER OBJECTIVES/EXPECTED OUTCOMES.

1. Improved personnel management procedures within the MACOM as a result of increased cooperation and understanding.
2. Increased retention of personnel as a result of improvements in the reenlistment program.

SUBORDINATE COMMAND OBJECTIVES/EXPECTED OUTCOMES.

1. Improved support from ODCSPER on reenlistment and other specific personnel management matters.
2. Exchange of ideas laterally on items of common interest.
3. Understanding of specific procedural requirements.

METHOD.

To achieve these objectives, the conference focused primarily on problem clarification and solving and secondarily on skill development. A combination of small and large group problem solving sessions, seminars with MILPERCEN program managers, and program managers within the MACOM, dialogues with the CG and DCGs, and experiential based training sessions were employed in the conference (see agenda).

RESOURCES.

1. Participation included S1/DPCAs and Reenlistment NCOs from subordinate commands (41 people), all Branch Chiefs and Action Officers in the Military Personnel Division of ODCSPER and several personnel from other divisions of ODCSPER (20 people), selected MILPERCEN program managers (approximately 10 people), the CG and DCGs and ADCSPER. As the need arose to include representatives from one other staff element of the MACOM, representatives from that staff element were included.
2. The conference was facilitated by 2 OESOs and 1 OENCO.
3. Administrative and clerical support was provided on site by four clerks and an Admin NCO from ODCSPER. Conference transactions to include draft action plans were provided to participants as developed during the conference. A list of agreements/decisions was provided at the end of the conference. A complete after action report was forwarded through command channels following the conference with an indorsement from the CG.
4. The conference lasted five days; however, several participants reported early or left late in order to take full advantage of the proximity of the conference site to coordinate unit-specific actions with the ODCSPER, other staff elements, and MILPERCEN.

PRE-CONFERENCE ACTIVITIES.

1. In November 1978, the conference coordinator announced the conference by message and solicited concerns from subordinate commands. Replies to this solicitation led, in part, to the decision to expand the scope of the conference from a focus on reenlistment concerns to a broader focus on military personnel management concerns.

3. Issue papers were consolidated prior to the conference and included in an information packet provided to participants upon registration at the conference in the evening before it opened. Participants were instructed to read these issue papers and submit any others they desired in the same format prior to the problem identification portion of the conference. A few were submitted and passed out after the opening session.

4. The evening prior to the conference opening an informal social meeting took place. This gave the ODCSPER and subordinate command representatives a chance to meet one another and to discuss unit-specific actions, problems, etc., that would not be appropriate for group discussion during the conference.

CONFERENCE PROCESS.

An outline of the way the conference was conducted follows:

1st DAY

General Session:

Opening remarks by DCG
Administrative remarks by conference coordinator and Admin NCO
Orientation by OESO (methodology, agenda, etc.)

Initial Subgroup Session:

Self-introductions
Discussion of participant expectations for the conference
Selection of subgroup spokespersons

Subgroup reports to the total group on conference expectations followed.

Problem Identification (by subgroup):

Brainstorm list of problems/concerns (see note #1)
Prioritize problems/concerns (see note #2)

General Session:

Subgroup reports on prioritized problem list
Spokespersons answered questions from the total group

2nd DAY

Seminars/Presentations: (see note #3)

Administrative overview by Dir, Admin/Audiovisual Support Activity
HR/EO Survey by HR/EO Officer
Reenlistment trends by MILPERCEN Program Managers
RETAIN operations by C, MILPER DIV
MOS 79D Branch overview by MILPERCEN Program Managers

General Session:

Review of process by OESO
Problem clarification guidance by ADCSPER

Problem Clarification (by subgroup):

Discuss impact of not resolving identified problems
Discuss expected outcomes/objectives for problem resolution
(success criteria)

General Session:

Subgroup reports to total group on impacts and expected
outcomes/objectives
Spokespersons answered questions (see note #4)
Cross fertilization of ideas between subgroups
Problem solving guidance issued by ADCSPER

3rd DAY

Problem Solving (by subgroup):

Develop alternate courses of action for identified problems
Select course(s) of action which meet criteria established in
the previous session
Draft action plan (see note #5)

Communications Workshop (see note #6)

General Session:

In-progress review of action plan by subgroup spokespersons
Cross-fertilization of ideas between subgroups

Problem Solving (continued in subgroups)

4th DAY

Career Planning Workshop (see note #7)

Seminar with MILPERCEN program managers

Dialogue with CG

Problem Solving (continued in subgroups)

5th DAY

General Session:

Subgroup reports on draft action plan
Agreements/decisions reviewed and recorded (see note #8)
Conference critique
Closing remarks by DCG

NOTES:

- #1. It was suggested that participants use issue papers provided at registration as a data resource but not restrict their problem identification to these.
- #2. Participants were instructed to arrive at a consensus on those problems or concerns that they wanted most to resolve through a group problem solving process.
- #3. MILPERCEN and MACOM representatives provided information and answered questions on specific items of interest. The timing of these seminars and presentations was significant in that it provided information to participants which was needed for the problem clarification phase of the conference.
- #4. During the session, it was realized that some additional expertise was needed in order to clarify two specific problems identified and arrangements were made to call in the experts for the subgroups that needed more information prior to developing the action plan.
- #5. Participants were asked to develop solutions/recommendations which stated specifically what and how actions should be taken, by whom, and by when.
- #6. Involved experiential learning as well as exchange of information on resources that are available to subordinate commands in conducting similar training in their units. Resources included Leadership & Management Development Course, OESO-facilitated workshops, films, and self-evaluation instruments.
- #7. OENCO briefed on the Career Planning Workshop developed primarily for 1st termers contemplating ETS and experientially exposed participants to portions of the workshop. Back home application was discussed by participants.
- #8. Throughout the conference, facilitators had recorded agreements/decisions/commitments that had been made by individuals or groups. At this time, a consensus check was made and the list was expanded upon.

RESULTS:

1. Short-term results of the conference were as follows:

a. Major issues/problems impacting on the ability of the MACOM and subordinate command personnel managers were identified, clarified, and a plan of action developed.

b. Participants from the subordinate command and ODCSPER were committed to the plan and other decisions made as the plan was being developed.

c. The attitudes of subordinate command participants toward the ODCSPER was improved as a result of the conference process. A sampling of comments made during the critique is at inclosure 1.

2. Long term results were evaluated six months after the conference. The conference coordinator traveled to subordinate commands to conduct this evaluation as well as conducted a review of records/reports and interviews with ODCSPER staff members. Major accomplishments* identified were as follows:

a. A noticeable increase in the actions by Commanders to get soldiers to reenlist and a modest increase in the command's reenlistment rate.

b. A definite improvement in working relationships as measured by the substantial reduction in "back channel" actions.

3. Factors* that interfered with successful resolution of certain issues/problems were as follows:

Unrealistic milestones and vague action officer assignments were the two most prevalent problems in getting issues solved. These problems were aggravated on the part of participants by assigning actions to others rather than themselves and to expect immediate results.

THE CONFERENCE IN RETROSPECT.

Looking back at the conference, the conference coordinator* made these observations and conclusions:

For a first conference, it was tremendously successful. The most valuable achievement was the change in perception from one of suspicion and distrust to one of respect and confidence. One would have to have experienced the attitudes before the conference to appreciate the change. The process recommended and facilitated by the OESO was extraordinarily valuable.

A follow up conference has been scheduled for November 1979.

*These comments were provided by the conference coordinator and reflect his opinion.

CONFERENCE CRITIQUE

At the conclusion of the conference, participants were asked to provide information to the coordinator. Presented here is a summary of representative comments.

OVERALL IMPRESSIONS:

1. Most effective workshop I've attended in 19 years.
2. Can't think of one thing that could have made this a better conference.
3. Much was accomplished.
4. Communications greatly improved.
5. Should be an annual affair.

<u>HOW WILL THE WORKSHOP HELP ON YOUR JOB?</u>	Number of Respondents
1. Understand system/more informed.	10
2. Ideas from others.	8
3. Developed positive relationships with staff at the HQ.	3
4. Insight into problems which will help in making decisions.	3
5. Appreciate the importance of my actions/job.	1

<u>WHAT WAS PARTICULARLY EFFECTIVE?</u>	Number of Respondents
1. Interaction of common problems in open environment and development of solutions.	13
2. Method/technique used to address problems.	4
3. Relationship building.	2
4. Flexibility to need of attendees.	1
5. Broadening knowledge.	1
6. Briefings by DA.	2
7. Self evaluation.	1

HOW CONFIDENT ARE YOU THAT REAL ISSUES WERE ADDRESSED?

1. Very unconfident	0
2. Unconfident	0
3. Don't know	5
4. Confident	12
5. Very confident	5

HOW CONFIDENT ARE YOU THAT REAL CHANGE WILL RESULT?

1. Very unconfident	4
2. Unconfident	0
3. Don't know	5
4. Confident	8
5. Very confident	6

<u>WHAT CHANGES IN PERCEPTION DO YOU HAVE OF ODCSPER?</u>	Number of Respondents
1. They understand problems and are willing to help.	5
2. Now I know they care about the job; I thought they did not before the conference.	4
3. I appreciate their problems/limitations.	3
4. Understaffed for what they're trying to do; I thought they were overstaffed.	1
5. Most problems are not really theirs to solve.	1
6. None	3

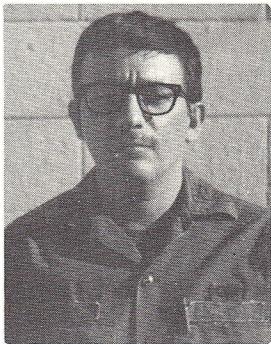
WHAT IS YOUR OVERALL EVALUATION OF THE CONFERENCE?

1. Very ineffective	0
2. Ineffective	0
3. Neither effective nor ineffective	0
4. Effective	10
5. Very effective	13

OE and the New OER System - A Case Study

CPT Anthony J. Giasi • MSG Thomas A. Graham

3d Armored Cav.,
Fort Bliss, TX



CPT Anthony J. Giasi was commissioned in Armor from the City College of New York in 1971. He served in Baumholder, Germany in the 2/68 Armor as a tank platoon leader, Company XO and a General's Aide. Upon completing the Infantry Advanced Course in 1979, he served as a training Company Commander and Staff Officer at Fort Dix. A graduate of OESO Class 5-78, he is currently assigned to the 3d Armored Cavalry Regiment, Fort Bliss, Texas, as the OESO.

MSG Thomas A. Graham entered the Army from Erie, PA in December 1961. Assignments include 6 CONUS posts, recruiting duty, ROTC duty, the University of Nebraska at Omaha, graduating in June 1974 with a BA in Business, and tours to Seoul Korea and Fulda, Germany. A graduate of USAOECS class 2-79, he is currently assigned as OENCO, 3d ACR, Fort Bliss, Texas.



INTRODUCTION

The advent of the new Officer Evaluation Reporting System (OERS) represents an opportunity for OE and the OESO to help take the "pain" out of organizational change. The transition period from the old to the new OERS will prove difficult. The new OERS, although well explained and publicized, will require the rater and rated officer to go through a thought process that was not required under the previous system. First, each officer must now, in collaboration with his rater, be able to define his job/duties (clarify his role). Second he must formulate, in conjunction with his rater, performance objectives (set goals) upon which he is to be evaluated. Third, there must be continuous two-way communication between the rater and the rated officer in the form of effective performance counseling.

The OESO, by virtue of his training represents an in-house resource that the commander may use to train his officers in the skills which are important in making the new OERS work.

WORKSHOP DESIGN

This case study documents an OE operation that was requested by the Regimental Commander. Prior to this, the OESO had briefed the Regimental Commander that, based on Regimental wide trends, conducting training in performance counseling and communication skills for the NCOs and junior officers would produce beneficial results in the traditional

indicators of unit effectiveness, particularly reenlistment. Workshops or skill development sessions had been proposed but none have been conducted. Upon return from the FORSCOM OE Conference, in September the OESO/OENCO briefed the Regimental Commander on the necessity for preparing the officers of the Regiment for the new OERS by conducting training in the skills required for successful implementation of the system. Two options were identified:

(1) OESO/OENCO train a cadre of trainers from each of the four squadrons, who in-turn would train all assigned officers in these skills.

(2) OESO/OENCO operate as trainers and present the training to all officers in the Regiment.

The Regimental Commander decided on option #2. He directed participation on the part of all officers in a one-half day workshop. It was also decided that only the skills required would be addressed; administrative details concerning the new OERS and the forms involved would be left to the squadron adjutants. Using the Commanders guidance as a starting point, a workshop was designed, geared to provide participants with the skills necessary to complete the OER Support Form (DA Form 67-8-1), and counsel their subordinates on their performance both before, during, and after the rating period.

The skills required were identified as:

(1) Role Clarification: Block (a) of the Support Form requires the rated officer to list his significant duties/responsibilities.

(2) Goal Setting: Block (b) of the Support Form requires the rated officer to list his performance objectives (goals). These form the basis for the evaluation of his performance during the rating period.

(3) Role Negotiation: AR 623-105 requires the rated officer to complete the Support Form and discuss his duties/responsibilities and performance objectives with his rater. In effect, the rated officer is negotiating his role and goals with his rater. At the end of this session, called the "Objective Setting Session", both rater and rated officer will have a mutually shared understanding of the rated officers role, responsibilities, duties and goals.

(4) Communications skills.

(5) Effective Performance Counseling: Block (c) requires the rated officer to list his significant contributions during the rating period. The rated officer is then counseled on how well he met his performance objectives. Counseling plays a crucial role in making this system work. By sitting down periodically with the rater, the rated officer gets information he needs to identify his strong points, his areas requiring improvement, and any changes in duties, objectives or priorities.

Using this as a starting point the workshop at figure 1 (4th revision) was designed for presentation to groups from 20 to 50 in size. Materials required were:

- a. USAOECS ST 26-150-2.
- b. Handout on communications.
- c. Rules of feedback.
- d. Lead-self (Leadership Effectiveness and Adaptability Description).
- e. Performance objective checklist at figure 2.
- f. Workshop evaluation sheet at figure 3.

Presentations were made to Support Squadron, 1st, 2nd, 3d Squadrons, and the Air Cavalry Troop, with members of the Regimental Staff attending these workshops as their individual schedules permitted.

The Evaluation Sheet was designed to serve a dual purpose. Responses were used as a basis to modify the initial design after each workshop. Additionally the five numbered questions were used as a measure of acceptance and effectiveness. Of all the officers participating, over one-half completed and returned the Evaluation Sheet. Overall, the unnumbered questions received positive comments with the exception of time expended. Starting at $4\frac{1}{2}$ hours in length, the design evolved to 3 hours for the final workshop after undergoing 4 revisions. Results of the numerical questions are:

Question number 1: (Mean 3.74)

Response:	1	2	3	4	5
Percentage:	2%	11%	10%	66%	12%

Question number 2: (Mean 3.66)

Response:	1	2	3	4	5
Percentage:	10%	15%	14%	58%	13%

Question number 3: (Mean 3.80)

Response:	1	2	3	4	5
Percentage:	0%	9%	18%	58%	16%

Question number 4: (Mean 3.43)

Response:	1	2	3	4	5
Percentage:	2%	18%	23%	50%	8%

Question number 5: (Mean 4.11)

Response:	1	2	3	4	5
Percentage:	1%	1%	11%	60%	8%

EVALUATION

Using strictly numerical results, the workshop appears to have been well received. Comments overall, were favorable; the only real objection being to its length. True success, however, can only be verified by conducting an evaluation of the system at a later time, with follow-up actions. Moreover, the real success of this project will lie in how smoothly the new OERS becomes established in the unit.

LESSONS LEARNED

Summarized below are those lessons learned that we feel will prove of benefit to the OESO/OENCO in the field who conducts this kind of workshop.

1. Do not allow yourself to get hooked on defending or justifying the new OERS.
2. To the maximum extent possible, allow participants to work with their own job/duties and performance objectives.
3. Use outside OE personnel as observers to critique the session. Base modifications on their feedback.
4. Definitely have the commander of participating unit present. In our case, this was the Squadron Commander. Remain flexible and follow his and the group's energy, especially with performance objectives. Much of the Commander's philosophy falls out here as guidance.
5. Be prepared for the individual with only one responsibility, "to close with and destroy or capture the enemy". Careful, the hook is out!
6. Be prepared for an initial hostile reaction from participants. They believe that they already are experts in these areas.
7. For practice counseling a fishbowl is more readily accepted and more productive than dyads. Critique is more honest.
8. Maintain a task-oriented atmosphere during the individual and group work portions of the workshop. Avoid the session getting bogged down in an extraneous philosophical discussion or side conversations.
9. Consider having the commander introduce the workshop, emphasizing its importance in making the new OERS work.
10. Insure that you emphasize to the participants at the beginning that the purpose of the workshop is to teach those skills required to make the new OERS work, as opposed to the administrative skills required. These are best left to the S1.

11. Exposure of these skills to the officers represents possible entry vehicle for spreading these skills to the NCOs through future endeavors or the "trickle down effect".

12. This workshop is a golden opportunity to gain maximum exposure for OE personnel. Capitalize on it!

SUMMARY

This workshop was designed with the objective of teaching the skills required to successfully implement the new OERS, as opposed to merely those required for the proper filling out of the Support Form (DA Form 67-0-1). Accordingly the thrust of the workshop activities was on developing those thought processes required by the participants to analyze and write significant duties/responsibilities, to formulate their performance objectives and to effectively counsel their subordinates on these. Emphasis must be on "How To" keeping theory to a minimum. At first this will not be easy, but after the participants have gone through the process things will start to fall in place.

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3. DA Pam 623-105 The Officer Evaluation Reporting System "In Brief".
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5. "New OER System Training Package" prepared by USA Administration Center, Fort Benjamin Harrison, IN 46216.

NEW OER SKILL BUILDING WORKSHOP

I. Introduction

- a. (2 Min) CDR introduces facilitators and establishes tone of workshop and his objectives.
- b. (3 Min) Facilitators give brief overview of OER support form, and skills needed to implement it, and workshop objectives.

II. Group participants by similarities of duties/responsibilities (Troop CDRs, XOs, Plt Ldrs and Staff)

- a. (30 Min) Groups develop lists of significant duties/responsibilities.
 - (1) Primary Duty
 - (2) Additional Duties
 - (3) Implied Duties/Responsibilities
- b. Groups prioritize lists.
 - (1) Things I must do.
 - (2) Things I should do.
 - (3) Things that can be postponed.
- c. (10 Min) Spokesperson for each group publishes the prioritized list.
 - (1) Total group processes list for additions, deletions, changes in priority.
 - (2) Raters comment on list.

III. Establish Performance Objectives

- a. (30 Min) Participants return to small groups.
 - (1) Prepare list on actions/functions that must be performed and resources needed to accomplish duties.
 - (2) Analyze lists (using OMR and/or Task, Standard, Time, Resources).
 - (3) Write performance objectives.
- b. (10 Min) Spokesperson for each group publishes lists.
 - (1) Group processes.
 - (2) Raters comment.

(3) Facilitators comment (if needed).

*IV. (15 Min) Lecturette on Situational Leadership

V. Negotiation of Duties and Performance Objectives

a. (10 Min) Participants separated in dyads.

**(1) Members of dyads role play negotiation as both rater and ratee.

b. Facilitators process by capturing one word adjectives to describe process and how they felt.

VI. Performance Coaching

a. (10 Min) Lecturette on barriers to communication; rules of feedback; active listening; and value of conflict.

**b. (10 Min) Participants separate into dyads.

(1) Each member role play rater and ratee assuming outstanding performance for some Performance Objectives and substandard for others.

c. (10 Min) Facilitators capture one word adjectives to describe process and how participants felt.

d. Group processes lists developed in Vb and VIc.

VII. (15 Min) Lecturette on Performance Coaching

a. Setting stage.

b. Presession homework.

c. Coaching session conduct.

VIII. (15 Min) Develop back home applications other than OER and closure.

*Situational leadership may be shortened to simply convey knowledge that different subordinates require different leadership styles.

**Original design called for dyads, however, experience show fishbowl was more effective.

PERFORMANCE OBJECTIVE CHECKLIST

1. Does the Performance Objective support the maintenance or improvement of unit goals?
2. Does the Performance Objective specify improvement directly related to the rated officer's area of responsibility?
3. Was the Performance Objective agreed upon by both the rater and the ratee?
4. Is the Performance Objective realistic and obtainable?
5. Is the Performance Objective clearly written and understood by both the rater and ratee?
6. Is the Performance Objective tailored as much as possible to the background, experience, training needs and interests of the rated officer?
7. Is the total number of Performance Objectives for a particular rating period limited in number (6 - 8) and associated with key job functions?
8. Are Performance Objectives ranked in order of priority?
9. Does the Performance Objective focus on expected results rather than methods of achieving results?
10. Are the resources available to achieve desired results?
11. Does the Performance Objective state conditions or constraints within which results are to be achieved?
12. Does the Performance Objective state standards or criteria of performance in specific observable, measurable terms, including a deadline for the achievement of expressed results?

EVALUATION

Evaluate questions 1 through 5 by placing a circle around the number corresponding to your opinion using the following scale.

Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
-------------------	----------	------------	-------	----------------

1

2

3

4

5

I now have a better understanding or grasp of how to:

1. Clarify my role or that of my subordinates.	1	2	3	4	5
2. Set goals for myself or my subordinates.	1	2	3	4	5
3. Conduct performance counseling.	1	2	3	4	5
4. Time spent here today was productive and beneficial.	1	2	3	4	5
5. I plan to utilize these skills with my superiors/subordinates.	1	2	3	4	5

Answer the following questions as completely, honestly and specifically as possible.

Would you recommend these skills be taught to NCOs? Why? Why not?

What I liked most was?

What I liked least was?

Write a short statement on ways to improve this course.

Fort Carson Evaluation of Organizational Effectiveness (OE) Operations

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During October 1978 the Fort Carson Human Resources Office (HRO) developed plans to evaluate the effectiveness of Organizational Effectiveness (OE) Operations, Equal Opportunity (EO) Operations, and Leadership and Management Development Course (LMDC). The concept paper for the evaluation program was published in the April 1979 Communique. The article listed six operations that were analyzed in the development of the evaluation program. This article provides an overview of the first of the six operations.

TITLE: Evaluation of Command Transition Operations

PURPOSE: To determine the effects of Organizational Effectiveness Command Transition Operations of Unit Operations

NULL HYPOTHESIS H: Command Transition Operations have no positive effects on unit operations.

EVALUATION FORMAT

DESIGN: Static Control Group with time series.

Editor's Note: It should be noted that the performance indicators mentioned in this study were used solely to facilitate this research effort. The results of this study are not intended for, nor were they used in the preparation of formal evaluations of the efficiency of any of the units involved or their personnel.

DESIGN NOTATION: $0_{t1} \times 0_{t2}$
 $0_{c_1} \ 1 \ 0_{c_2}$

MEASUREMENT INDEX: Eight Fort Carson Review and Analysis Indicators

AWOL Rated
Accident Rates
Awards and Decorations Submission
Equipment Losses (individual)
Equipment Losses (unit)
Reenlistment Rates
Operational Readiness
SIDPERS Personnel Slotting

DATA COLLECTION MEDIUM: Category IV -- Results. Interviews, surveys, historical data analysis.

STUDY UNITS: Five battalions that conducted a transition operation

Two Infantry Battalions
Two Artillery Battalions
One Armor Battalion

Five battalions that did not conduct a transition operation

Two Infantry Battalions
Two Artillery Battalions
One Armor Battalion

STUDY UNIT DELIMITATIONS: The following parameters were utilized for the selection of the study units:

- Stratified matched selection process (Infantry compared with infantry, etc).
- Matched type units will be from the same brigade.
- Matched unit's key personnel strengths will vary no more than one half of one percent.
- Matched units will be involved in the same type of operations during the assessment periods.
- Matched unit commanders will be DA command selected.

--Matched units will be compared using the following eight Command Performance Indicators.

- Accident rates
- AWOL rates
- Awards and decoration submissions
- Equipment losses (individual)
- Equipment losses (unit)
- Reenlistment rates
- Operational Readiness
- SIDPERS personnel slotting

--Transitions must be conducted one week before or one week after the change of command.

DATA COLLECTION PERIOD: December 1976 through March 1979

OPERATION SYNOPSIS: Each transition (X_t -Treatment) battalion conducted a command transition operation. Data was collected by two OESO's; analyzed and feedback to the battalion commander; 1 to $1\frac{1}{2}$ day workshops were conducted for each battalion, by the battalion commander and two OESOs: with the CSM, staff and commanders. Each battalion workshop focused on, but was not limited to, the eight performance indicators. Followup operations were conducted after the 120 day period of the change of command. Non-Transition units (X_c -Control) had no contact with OE personnel during the evaluation period. Commanders were "brought on board" by the unit staffs. The data for the evaluation was collected by one OESO utilizing interviews with unit commanders and staffs, surveys and the Review and Analysis Indicators reported quarterly to United States Army Forces Command.

FINDINGS

Eight Command Performance Indicators were assessed and analyzed. There were significant differences among the following five indicators:

- AWOLS
- Personal equipment losses
- Unit equipment losses
- Operational readiness
- SIDPERS personnel slotting

AWOLS - (See Table One)

The units which conducted transition operations AWOL rates for the 120 days after the change of command were less than one half that of the non-transition units. The rates for both groups increased within the 60 day period after the change of command. The non-transition groups rate increased at a rate, 30% higher than the transition group. The composite standard deviation for the sample AWOL data was 3.38.

OPERATIONAL READINESS - (See Table Two)

Overall, the transition units OR rate, improved by 5% during the 120 days after the change of command. The non-transition units showed a 12% decline over the same period. The greatest decline was in armor units. Daily equipment non-availability losses on a depreciated daily basis for the transition unit was \$2,485 and non-transition units was \$8,290. The composite standard deviation for OR data was 3.60.

PERSONAL EQUIPMENT LOSS - (See Table Three)

Equipment losses for the transition units during the 120 days after the change of command was \$27,905. Non-transition unit losses for the period was \$34,282. Losses were highest in Mechanized Infantry units. The average loss for transition units declined by 45% compared with the 120 day period prior to the change of command. The non-transition unit increased by 13%. The composite quartile deviation for equipment loss data was 1.20 (Q_4).

UNIT EQUIPMENT LOSSES - (See Table Four)

Unit equipment losses for the transition units during the 120 days after the change of command were \$781. Non-transition losses were \$6,391. The average loss for transition units declined by 10% compared with the 120 day period prior the change of command. Non-transition losses declined by 1/10 of 1%. The composite quartile deviation for equipment loss data was 0.164 (Q_4).

SIDPERS PERSONNEL SLOTTING - (See Table Five)

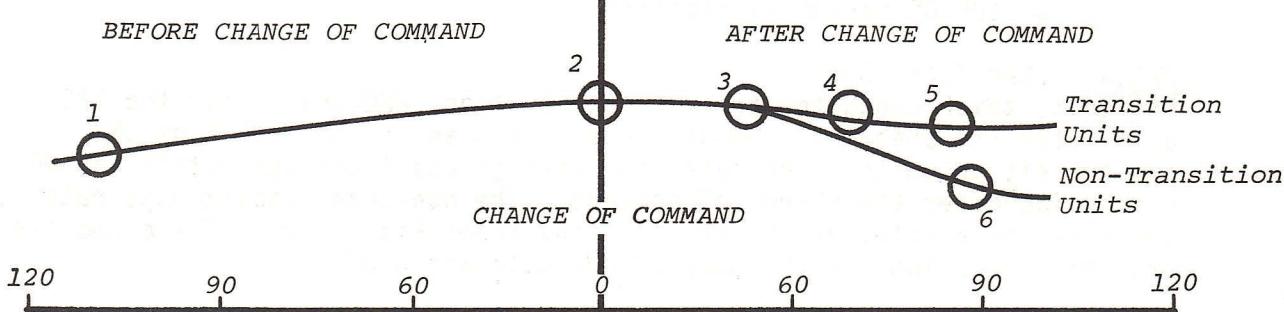
The average for transition units over the 120 days after the change of command for correct personnel slotting was .54 of 1% better than the unit non-transition. Utilizing an average daily wage for the affected grades, the loss through malslotting was \$169 daily.

Composite Standard Deviation: 0.33.

There were no significant differences in accident rates and submission of awards and decorations. Reenlistment was dropped as an indicator due to major uncontrollable variables.

GRAPHIC DEPICTION

Depicted graphically, the general overall trends for the two groups would be as follows:



Point 1 - Indicators begin to improve (Transition and Non-Transition units).

2 - Indicators are at their highest points (Transition and Non-Transition units).

3 - Non-Transition unit indicators begin to decline (Overall). Transition unit indicators begin to decline (Overall).

4 - Transition unit decline levels.

5 - Transition units indicators begin to improve.

6 - Non-Transition units indicators decline levels.

*Indicators for the transition units remained stable/higher over a longer period compared with non-transition units.

*Statistical indicators for all units were at their highest points 30-60 days prior to the change of command.

COST COMPARISON

Potential savings from the operation are as follows:

AWOL	\$12,412	(120 Days)
OR	172,650	(30 Days)
Per Eqpt loss	6,377	(120 Days)
Unit Eqpt loss	5,610	(120 Days)
Personnel slotting	<u>5,070</u>	(30 Days)
		\$202,119

The total average cost for a transition operation including, materials, facilities, OESO and participant man hours were \$2,350 per transition operation:

Total potential savings	\$202,119
Cost (5 Operations)	11,750
Estimated potential savings	\$190,369

CONCLUSIONS

- Command transitions operations have positive effects on unit operations.
- Command transitions operations have the greatest effect on those activities which are dealt with during the command transition operation.

- Items focused on during the command transition operation remain stable for a greater length of time in transition units versus non-transition units after a change of command.
- The benefit derived from a transition operation outweighs the cost to conduct the operation.

BATTALION COMMANDERS AND STAFF SUBJECTIVE CONCLUSIONS

To cross validate the statistically based conclusions, interviews were conducted with unit commanders and staffs which have used the Command Transition Operation. The purpose was to obtain their subjective evaluation of the effects the operation had on the unit. Their combined conclusions were:

- Command transition operations had positive effects on unit operations. The major effect was during the first 90 days of command. The operation provided the commander and staff a clear overview of the unit; key personnel and the immediate short range focus of the new commander.
- Command transition operations have the greatest direct effect on the issues dealt with during the operation. All unit activities are affected by the transition from a systems approach and fallout effect.
- Command transition operations provide the commander with a basis (data) to make decisions during the first 90 days of command that is not gained through standard day to day operations.
- The cost to the using unit in manhours is worth the benefit produced by the operation.

DISCUSSION OF FINDINGS AND CONCLUSIONS

In reviewing the findings and conclusions, I will discuss two major areas. First, the benefit derived from the operation by Fort Carson units. Second, the study's statistical, construct, internal and external validity.

Transition operations are conducted at Fort Carson on a voluntary basis. The objectives for the transition operations are: to reduce the amount of time that it takes for a new commander to learn about the unit and its personnel; and, for unit personnel to learn about the commander, his priorities and methods of operation. In the study units which conducted a transition operation, unit personnel stated that: (1) A broader base was developed to conduct unit operations under the new commander. This was possible because of the large amount of unit system-type data that was generated and discussed during the transition operation. This prepared the commander to face problems and decision situations effectively

and immediately after changing command. (2) Key issues were surfaced. The commander was given input to deal with them when the situation arose. In most cases, the new commander will discover sensitive issues after a problem has occurred. The transition operation and workshop provided a forum to surface and discuss sensitive issues. (3) The commander and his key subordinates learned about each other. Backgrounds, abilities and "pet peeves" were exchanged. (4) Old unit priorities were discussed and a unit focus was established. Key unit personnel gained an early understanding of how the new commander was planning to operate and where the unit was going. In those units which did not conduct a transition operation, the key personnel stated, after they were briefed on the conduct of a transition operation; (1) That, the unit was at its weakest point until the new commander "got his feet on the ground." (2) Any process or procedure that could accelerate the total information sharing process would have enhanced the unit's ability to accomplish its mission from a higher sustained level of preparedness.

Overall, the transition operation facilitated the exchange of information which created an initial environment that was more conducive to productivity. The commander was "brought on board" with the full knowledge of the unit situation; an awareness of his key subordinates; and sensitive issues. Through which, the groundwork was laid to establish an environment in which a more stable or improved situation could be created; i.e., a stable or improved Operational Readiness (OR) Rate.

Conclusively, the units at Fort Carson which conducted the Command Transition Operation, were better prepared to perform their missions during the first 120 days of the new commanders tours of duty.

In explicating the study's validity, I will discuss four areas. First, the conclusions that are drawn concerning the change in unit indicators caused by the command transition operation. Second, statistical conclusion validity which refers to the validity of conclusions drawn on the basis of statistical evidence that the variance in the eight performance indicators were due to the conduct of the transition operation (cause and effect co-vary). Third, construct validity which examines the validity generalizations that may be drawn from the command transition operation and changes in performance indicators. Fourth, external validity which refers to the application of the relationship findings between the command transition operation and unit analysis variables for the study situation that can be applied with other units with the same outcome.

Internal Validity

In assessing the internal validity of the study 13 areas were analyzed.

- History
- Maturation
- Testing
- Instrumentation
- Statistical regression
- Selection
- Interaction with selection
- Direction of causal influence
- Diffusion of treatment
- Compensatory treatment
- Compensatory rivalry
- Respondents resentfulness
- Local history

History - The transition and non-transition units were involved in the same type of activities thereby, eliminating the possibility that some event not considered in the analysis, could have caused the improvements noted in the performance indicators for the transition units.

Maturation - The maturity level of each matched type unit was assessed. There were no significant differences between matched type units (infantry compared with infantry, etc.). The data for the analysis was collected for each unit from the change of command. The maturity level for each unit was the same at the beginning of the assessment period. However, the transition units may have matured faster because of the environment created by the transition operation.

Testing - No tests were administered during the assessment periods.

Statistical Regression - Study units were not classified based upon pretest scores. The classification was based upon the units participation or non-participation in the transition operation.

Selection - There was no significant difference between the makeup of the personnel of the matched type units. The commanders of each unit were Department of the Army Command selected. I know of no method to compensate for the abilities and leadership and management styles of the different commanders. Data was not available to predict the probable success factors for each commander.

Interaction with Selection - (Selection-Maturation) There were no significant differences between the initial maturity levels of each matched type unit (Infantry compared with Infantry, etc.). However, the transition units may have matured faster because of the environment created by the transition operation.

Ambiguity about the Direction of Casual Influence - Matched type comparison units were from the same brigade. All units were located at Fort Carson. It is possible that a spill over or diffusion of some of

activities experienced by the transition units were imitated by non-transition units. Considering this propinquity, there was a significant difference between the indicator for the transition and non-transition units.

Compensatory Equalization of Treatment

Not a factor.

Compensation Rivalry

Not a factor.

Resentful Demoralization of Respondents Receiving Less Desirable Treatment

Not a factor.

Local History - No irrelevant historical events were observed that would have affected the indicators used to compare the study units.

Statistical Conclusion Validity

This study was conducted to determine the effects that a transition operation had on key unit performance indicators in the units which conducted the operation, in comparison to variables in the non-transition units.

As a reliability factor I chose the standard cutting point P is less than .05. I regard any relationship in this study that is below the 5 percent level as "true", while those above 5 percent being false. In comparing the indicators for each group against the total population the composite standard deviation was less than 5 percent in each case. In comparing matched type units against each other and the total population, which amounted to 75 comparisons, 2 computations did not meet the less than 5 percent criteria.

The taxonomy that affects the reliability of the validity of the acceptance of the statistical conclusions involves:

- Statistical Power
- Error Rate Problem
- Reliability of Measures
- Reliability of Treatment
- Heterogeneity of Respondents
- Random Experimental Settings

Statistical Power - In my conclusions, I choose to reject the Null Hypothesis, thereby eliminating the possibility of a type II error. The chances of making a type I error were minimized by selecting a low level of significance (P less than .05) thereby increasing the probability

that the Null hypothesis would be rejected and that we would accept the conclusion that there was a difference between the performance indicators for the two groups of units.

Error Problem Rate - Not a factor.

Reliability of Measures - To improve the reliability of the indicators, statistical measures were collected 120 days before the change of command and 120 days after the change of command. By using the data for the period prior to the change of command, we can get a better, more accurate picture of the true level of the performance indicators. This was necessary because some commanders take actions near the end of the tour of duty to improve the statistical indicators, which makes it difficult for the new commander to maintain a high level of preparedness in all areas.

Reliability of Treatment All five battalions received the same treatment during the same periods after the change of command.

Heterogeneity of Respondents - As much as possible the respondent units were matched in as many personnel related areas.

External Validity

This class of validity assesses the results of the sample study and the generalizations that may be drawn in relation to the entire population. There are six major areas that affect external factor validity. They are:

- Interaction of Treatments
- Interaction of Selection and Treatment
- Interaction of Testing and Treatment
- Interaction of Setting and Treatment
- Interaction of History and Treatment
- Generalization Across Effect Constructs

Interaction of Treatments

Not a factor. The transition operation units received one treatment. The second treatment for the transition group is a followup operation. No followup operations were conducted during the assessment and analysis periods.

Interaction of Testing and Treatment

The data used in this study was obtained through normal monthly and quarterly reports. No tests were administered to the transition and non-transition units during the evaluation period.

Interaction of Selection and Treatment

The personnel which participated in the studies generally matched the rank, time in the unit and experience levels of the individuals of the battalion populations at Fort Carson.

Interaction of Setting and Treatment

The study was conducted utilizing only military units. The findings are probably applicable to only military units.

Interaction of History and Treatment

Not a factor. All study units received new commanders at the beginning of the test period. All treatment unit commanders conducted a command transition operation. Non-treatment unit commanders did not conduct a command transition operation.

Generalization of Effect Constructs

No short range negative secondary effects were noted as a result of the command transition operation. A random sampling of other statistical indicators was conducted. There was no appreciable differences noted that could be related as a "Fallout Effect," from the command transition operations. The data was fed back to the commander and staff. A workshop was conducted in which the eight indicators were the focus. As an outcome or effect of the workshop, a more healthy environment was created; i.e., in the maintenance area. Actions were taken to improve the maintenance situations which was the cause, which stimulated the situation, to improve the Operational Readiness Rate. By assessing a matched situation which excludes the command transition operation, we can determine the effect of the OE effort by analyzing the differences between the indicators for the two groups.

In assessing the studies construct validity I found it impossible to extrapolate with any logical certainty the total effect that the transition operation would have on other units in an environment dissimilar to Fort Carson.

CONSTRUCT VALIDITY

In assessing the studies construct validity, I analyzed three contributing factors.

- A. Commander
- B. Staff
- C. Command Transition Operation.

These three variables were assessed using a three-step process.

CAUSE-----EFFECT/CAUSE-----FINAL EFFECT

This analysis process differs from the standard situation evaluation process which analyzes only two functional steps.

CAUSE-----EFFECT

In using a 2-step process, it was impossible to show directly that the command transition operation had a direct effect on the eight assessed statistical indicators. However, if we take the approach that the unit commander, staff and OE process combined in a command transition operation, with the data generated in conduct of the operation: with an initial effect that a more productive environment was created, which generated an additional fall out cause that precipitated the final effect. The eight performance indicators were the final effect items.

EXAMPLE: The maintenance and operational readiness data was feedback to the commander and staff. A workshop was conducted in which the eight indicators were then focused. As an outcome or effect of the workshop, a more healthy environment was created i.e., in the maintenance area. Actions were taken to improve the maintenance situation, which was the cause which stimulated the improvement in the operational readiness rate.

By assessing a matched situation which excludes the command transition operation. We can determine the effect of the OE effort by analyzing the differences between the indicators for the two groups.

SUMMATION

In summation, the findings of this study provided a basis to reject the null hypothesis that command transition operations have no positive effects of unit operations. The operation had significant positive effects on AWOL rates, individual equipment losses, unit equipment losses, operational readiness rates, and SIDPERS personnel slotting. These results were derived using a dual causality approach in linking the command transition operation to the improvements in the statistical indicators.

I recommend that the findings for this study be used as a basis for additional research in this area.

APPENDIX

TABLE 1 AWOL

TABLE 2 Operational Readiness (OR)

TABLE 3 Personal Equipment Losses

TABLE 4 Unit Equipment Losses

TABLE 5 SIDPERS Personal Slotting

ACKNOWLEDGEMENT

-Data and technical advice for this study was provided by the Office of the Comptroller, Fort Carson, Colorado.

TABLE 1

AWOL (E1-E6)
 X_t -- Transition Units

Unit	60 Days Prior	Change of Command	60 Days After	120 Days After
A ₁	16	4	5	4
B ₁	13	4	6	7
C ₁	4	2	6	3
D ₁	3	1	2	2
E ₁	5	1	5	7
	41	12	24	23

Number of personnel listed AWOL during 120 day period after change of command - 47

Average length AWOL period - 9.2 days

Average daily wage E1-E6 - \$29.33

9.2 x 47 = 432.4 days Total Lost Mandays

$\frac{-x29.33}{\$12682.00}$

Value of Lost Mandays

 X_c - Non-Transition Units

Unit	60 Days Prior	Change of Command	60 Days After	120 Days After
A ₂	10	6	8	6
B ₂	11	2	18	13
C ₂	19	2	15	14
D ₂	0	5	6	8
E ₂	4	0	3	2
	44	15	50	43

Number of personnel listed AWOL during 120 day period after change of command - 93

Average length of AWOL period - 9.2 days

Average daily wage E1-E6 - \$29.33 Lost Mandays

9.2 x 93 = 855.60 days

$\frac{x 29.33}{\$25,094.00}$

Value of Lost Mandays

Lost Mandays

47

Transition Units

93

Non-Transition Units

46

Difference - Lost mandays dollar value \$1349.18

TABLE 1 cont

INFANTRY	COMPARED	WITH	INFANTRY	-	TOTAL	DIF	%
A ₁ 16	4	5	7	-	16		
A ₂ 10	6	8	6	-	20	+4	25%
B ₂ 13	4	6	7	-	17		
B ₂ 11	2	18	3	-	23	+7	30%
ARMOR	COMPARED	WITH	ARMOR	-	TOTAL	DIF	%
C ₁ 4	2	2	3	-	7		
C ₂ 19	2	15	14	-	31	+24	- 343%
ARTILLERY	COMPARED	WITH	ARTILLERY	-	TOTAL	DIF	%
D ₁ 3	1	6	2	-	9		
D ₂ 0	5	6	8	-	19	+10	- 111%
E ₁ 5	1	5	7	-	13		
E ₂ 4	0	3	2	-	5	-8	+ 162%
					TOTAL	+37	- 347%

The units which conducted a transition had 37 fewer AWOL's.
 Matched type unit the unit which had 347% fewer AWOL's.

MEAN VALUE (Average number of AWOL's)

Infantry	6.92
Artillery	3.58
Armor	6.33
Composite	5.61

VARIANCE (Fluctuation between the averages)

Infantry	18.08
Artillery	6.08
Armor	33.56
Composite	2.18

STANDARD DEVIATION (Total population)

Infantry	4.20
Artillery	2.47
Armor	5.79
Composite	3.38
Variance	1.46

TABLE 2

OPERATIONAL READINESS
 X_t Transition Units

	<u>120 Days prior</u>	<u>Change of Command</u>	<u>60 Days after</u>	<u>120 Days after</u>
A ₂	88	89	94	96
B ₁	91	92	93.8	94
C ₁	84.1	84.4	85.1	86.2
D ₁	94	93.8	89.1	91.2
E ₁	75	85.4	86.7	87.2
	<u>86.42</u>	<u>88.92</u>	<u>89.74</u>	<u>90.88</u>

Artillery average change of command	89.6
Armor average change of command	84.4
Infantry average after change of command	90.0
Artillery average after change of command for 120 day period	85.55
Armor after change of command for 120 day period	85.65
Infantry average after change of command for 120 day period	94.45
Artillery difference change of command-Average 120 days	-01.100
Armor difference change of command-Average 120 days	+01.500
Infantry difference change of command-Average 120 days	+04.90
Overall Change	+04.54

X_c Non-Transition Units

	<u>120 Days prior</u>	<u>Change of command</u>	<u>60 Days after</u>	<u>120 Days after</u>
A ₂	91	92	3.88	94
B ₂	95	77	89.70	87.70
C ₂	84	84	72.10	82
D ₂	90	88.10	88.20	88
E ₂	88	83	82.10	83.40
	<u>89.6</u>	<u>84.82</u>	<u>85.19</u>	<u>86.94</u>

Artillery average change of command	85.60
Armor average change of command	84.00
Infantry average after change of command	84.40
Artillery average after change of command for 120 day period	83.92
Armor average after change of command for 120 day period	77.05

Infantry average after change of command for 120 day period	83.92
Artillery difference change of command-Average 120 days	-02.00
Armor difference change of command-Average 120 days	-09.02
Infantry difference change of command-Average 120 days	-01.05
Overall Change	-12.07
Comparative differential-overall transition units OR rate .1661	
12.07 - Transition Units	1
04.54 - Non-Transition Units	
16.61	
<u>Transition Units</u>	

<u>Reportable Equipment Costs</u>	<u>120 Days Avg</u>	<u>Change of</u>
	<u>Rate After Minus</u>	<u>Command Rate</u>
2 Mechanized Battalions	\$14,581,172.00 X (94.45	- 90.00)= \$648,137
1 Armor Battalion	\$30,389,146.00 X (85.65	- 84.40)= \$379,863
2 155 Artillery Battalion	\$12,700,125.00 X (85.55	- 89.60)= <u>-\$133,352</u>

Approximate value of equipment available for use from increased OR rate:
\$894,648

<u>Non-Transition Units</u>		
2 Mechanized Battalions	\$14,581,172.00 X (83.92	- 85.60)= -\$244,964
1 Armor Battalion	\$30,389,146.00 X (84.00	- 77.05)= -\$2,112,045
2 155 Artillery Battalions	\$12,700,125.00 X (84.40	- 83.92)= <u>-\$609,601</u>

Approximate value of Equipment not available for use from decreased OR rate:
\$2,996,610

Transition and Non-transition Equipment Value Differentials:

Transition Units +\$894,648.00 divided by 360 days = \$2485.13
 Non-transition Units -\$2,996,610.00 divided by 360 days = -\$8340.58

<u>Differential Range</u>	<u>Annual</u>	<u>Daily</u>
	\$3,861,258	\$10,725.71

Daily value of equipment available for use from increased OR rate for
 transition units: \$2485.13

Daily value of equipment not available for use from decreased OR rate for
 non-transition units: \$8240.58

MEAN VALUE (Average OR Rate)

Infantry	91.10
Artillery	87.18
Armor	82.30
Composite	86.86

TABLE 2 cont

VARIANCE (Fluctuation between Averages)

Infantry	23.55
Artillery	10.60
Armor	22.41
Composite	12.96

STANDARD DEVIATION (Total Population)

Infantry	4.85
Artillery	3.26
Armor	4.73
Composite	3.60
Variance	0.52

TABLE 3

PERSONAL EQUIPMENT LOSS (\$)
 X_t Transition Units

	<u>120 Days prior</u>	<u>Change of Command</u>	<u>60 Days after</u>	<u>120 Days after</u>
A ₁	\$2613	\$4218	\$5445	\$2586
B ₁	6451	8683	3995	100
C ₁	2813	4034	3082	4461
D ₁	818	933	200	994
E ₁	2255	3456	4261	2781
	<u>\$14,950</u>	<u>\$21,333</u>	<u>\$16,983</u>	<u>\$10,922</u>

Total loss 120 days after change of command \$27,905.00
 Average 60 day loss prior change of command \$21,333.00
 Average 60 day loss after change of command \$13,952.00
 Percent change overall -45%
 Difference change of command - 120 days after -\$10,411.00

X_c Non-Transition Units

	<u>120 Days prior</u>	<u>Change of Command</u>	<u>60 Days after</u>	<u>120 Days after</u>
A ₂	\$ 5324	\$10,043	\$ 7104	\$ 6621
B ₂	351	1986	5591	5906
C ₂	5512	8354	3254	2329
D ₂	2843	1895	1283	1110
E ₂	1108	197	211	273
	<u>\$15,138</u>	<u>\$21,333</u>	<u>\$17,443</u>	<u>\$16,489</u>

Total loss 120 days after change of command \$34,282
 Average 60 day loss prior change of command \$15,138
 Average 60 day loss after change of command \$17,140
 Percent change overall +13%
 Difference change of command - 120 days after \$ 5,716
 Transition units \$10,411
 Non-Transition units \$ 5,716
 Dollar differential \$ 4,695

MEAN VALUE (Average Equipment Losses)

Infantry \$5,189.83
 Artillery 1,466.17
 Armor 3,778.66

QUARTILE DEVIATION (Q_4) (Total Population)

Infantry	2.39
Artillery	5.34
Armor	3.63
Composite	1.20
Variance	1.46

TABLE 4

UNIT EQUIPMENT LOSSES (\$)
 X_t Transition Units

	<u>120 Days prior</u>	<u>Change of Command</u>	<u>60 Days after</u>	<u>120 Days after</u>
A ₁	\$8297.94	\$ 62.54		\$ 21.00
B ₁	2387.17	1031.69	\$ 18.66	120.74
C ₁		547.68	8107.51	255.00
D ₁	335.91	5.67	65.11	76.33
E ₁	<u>32.72</u>	<u>3515.49</u>	<u>292.39</u>	<u>118.07</u>
		<u>\$ 5163.07</u>	<u>\$8483.67</u>	<u>\$781.07</u>

Total loss 120 days after change of command \$781.07
 Average 60 day loss prior change of command \$5163.07
 Average 60 day change of command \$4632.37
 Percent Change of Command overall 10%
 Difference change of command - 120 days after (Decreases) \$4382.00

X_C Non-Transition Units

	<u>120 Days prior</u>	<u>Change of Command</u>	<u>60 Days after</u>	<u>120 Days after</u>
A ₂	\$466.47	\$104.52	\$436.99	\$1394.00
B ₂	351.44	2387.17	1031.69	1866.00
C ₂	42.45	2707.55	1119.74	340.00
D ₂	185.73	37.10	116.54	61.70
E ₂	<u>0</u>	<u>267.14</u>	<u>1907.00</u>	<u>2730.20</u>
		<u>\$5503.48</u>	<u>\$4611.96</u>	<u>\$6391.90</u>

Total loss 120 days after change of command \$6391.90
 Average 60 day loss prior change of command \$5503.48
 Average 60 day loss after change of command \$5501.93
 Percent change overall .001%
 Difference change of command - 120 days after (Increase) +888.42

Transition units \$ 4382.00
 Non-Transition units +888.42
 Dollar differential \$ 5270.42

MEAN VALUE (Average Equipment Losses)

Infantry	706.19
Artillery	812.30
Armor	2179.58

QUARTILE DEVIATION (Q₄) (Total population)

Infantry	2.30
Artillery	2.41
Armor	2.69
Composite	0.164
Variance	0.026

TABLE 5

SIDPERS (PERSONNEL SLOTTING)
(Percentage of Personnel Slotted Correctly)

Unit	X_t Transition Units				
	60 Days <u>Prior</u>	Change of <u>Command</u>	60 Days <u>After</u>	120 Days <u>After</u>	120 Day <u>Average</u>
A ₁	97.8%	99.4%	100%	97%	98.50%
B ₁	99.5	97.8	98.8	99	98.90
C ₁	99.6	100	100	98	99.00
D ₁	100	99.8	99.8	98	98.90
E ₁	100	100.00	99.8	100	99.90
				Total Average	495.20% 99.04%
Unit	X_t Transition Units				
	60 Days <u>Prior</u>	Change of <u>Command</u>	60 Days <u>After</u>	120 Days <u>After</u>	120 Day <u>Average</u>
A ₂	97.6%	98%	98%	98%	98.75%
B ₂	98.3	97.8	100	100	100
C ₂	100	100	99	100	99.50
D ₂	99.7	100	96	99	97.50
E ₂	100	100	96	98	97.00
				Total Average	492.50% 98.55%

Mean Value Differential

(Mean value transition units minus Non-transition units)

.9904 - .9850 = .0054 (Decimal position changed)

Dollar value of personnel malslotting

(Average daily wage for E1-E7, 01-03, times average battalion strength, times mean differential)

\$49.20 X 637 X .0054 = \$169.24

\$169.24 Daily mean loss through malslotting.

MEAN VALUE (Average correct slotting)

Infantry	98.73
Artillery	98.86
Armor	99.50
Composite	99.03

TABLE 5 cont

VARIANCE (Fluctuation between averages)

Infantry	1.12
Artillery	2.14
Armor	0.58
Composite	.11

STANDARD DEVIATION (Total population)

Infantry	1.05
Artillery	1.46
Armor	0.76
Composite	0.33
Variance	0.287



OE Applications, Results, and Hospital Issues - MEDDAC

Bernard J. Horak
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Captain Horak has been assigned as the Organizational Effectiveness Officer, Fort Hood, MEDDAC, since his graduation from OECS Class 1-78 in April, 1978. His eight years of service in the Medical Service Corps has included assignments as a Commanding Officer of a Medical Company; Administrative Assistant to the Deputy Commander/Chief, Professional Services of the 2d General Hospital, Landstuhl, Germany; and Administrator of the 540th General Dispensary, Kaiserslautern, Germany. He received his BS in Business Administration and Sociology from Trinity University and his MS in Systems Management from USC. In addition to OECS, he has attended the AMEDD Advanced Course and the Patient Administration Course.

I. INTRODUCTION

The purpose of this paper is threefold: (1) To present a summary of major interventions and their results that have occurred during my eighteen months at MEDDAC, Fort Hood, Texas; (2) To take issue with some of the common reservations about the utility and use of OE in the hospital environment; (3) To outline some of my perspectives and caveats for the edification of OESO's who are currently assigned or anticipating an assignment as an OESO in a MEDDAC. It is my hope that these thoughts will prove useful to:

(1) hospital department and service chiefs who desire to know specifically how OE can help them, and

(2) FORSCOM and TRADOC OESOs, considering accepting clients in the MEDDAC, who desire to know if OE can possibly be applied in such a seemingly complicated and frustrating system as an army hospital.

II. OE APPLICATIONS AND RESULTS -- MEDDAC, FT HOOD

OE is not a panacea for all problems, however when tailored and selectively applied it has resulted in the following benefits to the MEDDAC:

1. More effective and expeditious management transition as experienced by the Commander and Executive Officer, MEDDAC; C, Veterinary Activity; Commander, Medical Company; and chiefs of Food Service, Family Practice and OB Service. Through "transition meetings," in which problems, issues, goals, and expectations were openly discussed, these managers state they were more quickly "on board" and able to make substantive decisions and take needed action within approximately 30 days of assumption of duties.

2. Improved Skill Qualification Test (SQT) scores, Troop Medical Clinic (TMC) operations, and installation health care planning have resulted from an OE designed and facilitated problem solving committee consisting of members of the MEDDAC Executive Committee, FORSCOM medical commanders, and command and flight surgeons. By establishing solid lines of communication and mutual support arrangements, greater responsiveness in providing installation health services is occurring despite critical shortages of personnel. Work group effectiveness, as measured over nine separate criteria, showed an impressive 100% increase over the one year OE technology was used.

3. Increased productivity has been obtained in the Clinical Records section (reduction of backlog from 22 to six days over a three-month period of time) through problem identification, supervisory coaching, and active participation by work group in recommending actions, planning, and monitoring work flow.

4. Reduced absenteeism and increased job satisfaction through job enrichment and participatory management techniques were documented by before-after survey in Plans, Operations and Training Division; Patient Administration Division; and on a medical ward. It is assumed that continued efforts will result in higher retention rates.

5. Increased patient satisfaction and reduction of patient complaints have been documented (written complaints dropped from 24 to seven in five months). Results have been attributed to a series of 12-hour seminars in patient-staff relations, to providing specific feedback to the staff on patient comments, and to direct exchange in structure meetings between patients and clinical staff.

6. Greatly improved medical student summer training programs were realized after open evaluation of last year's program and joint planning by students and staff. Students from the Health Professions Scholarship Program (HPSP) and Uniform Services University (USU) state the redesign from classroom orientation to total experiential learning provided a lasting knowledge base and excellent appreciation for the Army and Army medicine.

7. Better departmental management, particularly necessitated by declining resources, has been realized by focusing on better utilization of people, time, and work flow. OE consultation in problem identification, planning and facilitation of improvements has had extremely positive results

in improving operations in DENTAC, Personnel, Preventive Medicine, and on a surgical ward. These changes have largely come about by focusing on organizational processes such as communication, delegation, problem solving, and superior-subordinate and coworker relationships. To deal with efficiency in work and patient flow, a team consisting of the OESO and Nursing Methods Analyst is available to managers. Physician and nursing managers state this consulting team is of great benefit in view of their limited time and desire for objective and interdisciplinary assessment.

8. Improved hospital-wide goal attainment has largely been due to a high sense of organizational commitment and acceptance of change through open systems planning, responsibility charting by the Executive Committee, and joint planning/teambuilding meetings with department and service chiefs. The initial charting sessions plotted 78 specific objectives/projects; within one year the list was down to 35. Using a modified MBO system with the new Officer Efficiency Report (OER) System, individual objectives are being integrated with organizational goals and concerns.

9. Greater horizontal integration in the organization through interdisciplinary meetings among clinical, nursing, and administrative services, which have been of tremendous benefit in coordinating health delivery on the wards and clinics and in seeing complex projects through to fruition.

10. Better management training resulting in improved supervisory skills has been realized through interdisciplinary training and liaison among the OESO, Nursing Educational Coordinator, and Chief, Plans, Operations and Training. Seminars across medical, nursing, and physician lines have been given in counseling, communication, decision making, and stress, time, and conflict management.

11. Increased responsiveness and availability of managerial resources have been attained as a result of OESO knowledge and ready access to various consultants and reference material on managerial techniques, literature, and diagnostic tools such as questionnaires and surveys. This, therefore, obviates the need for practicing managers to do research in these areas. Additionally, the OESO serves as a "broker" to obtain needed resources, e.g., a psychologist to provide counseling training or a management analyst to assist in work flow studies.

12. Increased information and awareness of organization problems by providing candid feedback from the work force through the OESO has been particularly helpful to managers in sensing the "pulse" of the organization, making decisions, planning change, and assessing the impact of various programs and projects. Additionally, this input has

allowed for the critical identification of problems adversely affecting patient care. By OESO anonymously asking the question: "What is getting in the way of patient care?", many managers state that significant patient care problems were identified that needed attention.

13. Better identification of local factors affecting physician and dentist retention has been important to commanders and chiefs of services. It is felt that the resolution of local organizational problems and issues is directly related to overall retention.

14. Greater clarity of roles and less organizational confusion have resulted from job clarification workshops for new health providers such as nurse practitioners and family practice physicians.

15. Improved committee, conference, and meeting effectiveness has been identified by chairpersons using OE facilitation techniques. Committees/ meetings were shown to accomplish objectives, finish in less time, and obtain better acceptance of decisions. This has been accomplished by clarifying meeting objectives, following a set agenda, observing group dynamics, and giving feedback on the flow or process of the meeting.

III. ISSUES AND ANSWERS

The applications and results mentioned in Part II do not come without difficulties and pitfalls. Consultants entering health care organizations must be cognizant of unique dynamics and characteristics which may inhibit OD efforts.

Also, my experience is that hospital managers desire to bypass discussions of OE concepts, models, and methodology, preferring to get to the specifics of how OE can help them solve problems and deal with bottom-line concerns in their ward, clinic, or service. Department/ service chiefs, especially physician managers, will frequently ask three direct questions: What are the bottom-line effects and results? How is this going to make my admin job easier so that I can see more patients? What results do you have to show that this will work?

There is a tremendous dearth of literature concerning OD applications in health care settings for the OESO to turn to. Only recently has there been a major reference ("Towards Healthier Medical Systems: Can We Learn From Experience?", Journal of Behavioral Science, Vol 14, No 3, 1978). There are many good articles that describe unique characteristics, dynamics, and complexities of health care organizations; however, few mention any hospital-wide OD efforts or any specific results. Ironically, when considering the use of OE technology in hospitals, one article seems to stick in the mind of many health care managers and consultants--"Why Organization Development Hasn't Worked

(So Far) in Medical Centers" (Weisbord, 1976). In my early efforts at Ft Hood and later in doing external work with VA hospitals, I encountered managers who were quick to refer to this article in support of their reservations about OE.

Weisbord states that medical centers "...share with hospital complexes, multispecialty clinics, and health maintenance organizations the tendency towards diverse goals, diffuse authority, low task interdependence, few performance measures -- all highly resistant to Organization Development." He points out that hospitals consist of three often conflicting social systems, not the one system (task/management) found in industry:

Professionals are enmeshed in three social systems--Task, Identity, Governance--that pull and tug at each other. Health administrators operated the least influential of the three, quite the reverse of the situation of the industrial manager. The Task system refers to specific work...to coordinate three tasks: patient care, education, and research. Identity system refers to the professional development...on which the status and self-esteem of health professionals depends. The Governance system is the network of committees, boards, and agencies...which set standards for the profession. Each system has its own ground rules and membership requirements. Each is necessary to the others...Yet the Task system is, in many ways, at odds with the Identity and Governance systems, and vice versa.

Weisbord further describes the uniqueness of hospitals and complexities facing health managers by giving examples from each system. Regarding the Task system, he states that health managers are caught between a multiplicity of duties and roles--ambulatory care, inpatient care, teaching, administration--all of which must go on simultaneously. Thus, these multi-hatted managers must constantly face the questions/problems of compatibility of goals, task differentiation, and decisions on the proper mix and balance of responsibilities and resources.

Regarding the Identity system he submits that "Physicians identify less with a specific institution and more with the culture of medical science... The rewards of respect and reputation may come more from this larger arena than from their institutional affiliation."

Referring to the third system, Weisbord states: "Governance systems work against interdependency. Departmental loyalties are more intense than loyalty to the whole which the Governance represents. Without concrete institutional goals, it is hard to favor anything except what will be least restrictive of one's own freedom of action."

He concludes that OD hasn't worked so far because (1) there is a lack of knowledge of techniques to link the three systems so that both individual and organization are enhanced, (2) OD's interdependence-enhancing technology does not work where there is no payoff for interdependent behavior, and (3) OD repertoire lacks structure-creating interventions consistent with OD humanistic values. He submits that we must own up to our ignorance, understand complexities, and look for innovations on how to create a better fit between people and work in health organizations.

Since the Weisbord article, there has been renewed optimism as a result of new focus and experimentation in health systems. The July, 78 special edition of JABS--"Towards Healthier Medical Systems..."--identifies the specifics of this new outlook and shows some positive results of recent OD efforts.

It must be noted the Weisbord article dealt with the most complicated of health systems--the medical center which has extensive teaching and research missions in addition to patient care. I submit that smaller, less complex health organizations like clinics, hospitals, and dental activities, do not share the characteristics and problems which render OD ineffective in medical centers.

Within the MEDDAC, the Executive Committee, virtually all departmental chiefs, and I strongly feel that OD works. The results enumerated earlier more objectively support our experience of successful OD application in a hospital. I feel that our fortune was due to: (1) recognition of unique hospital characteristics and issues as identified by Weisbord, other writers, and our local assessment; and (2) the tailoring of our OE program by developing strategy to deal with these issues.

Thus, I wish to supplement Weisbord's article by adding my own perspectives of hospital issues and by offering caveats for OESOs who are about to work in a MEDDAC.

IV. PERSPECTIVES AND CAVEATS

1. A hospital is really three hospitals because of total personnel turnover by shift changes (day, evening, night).
2. Hospitals have three organizational hierarchies, consisting of largely autonomous medical, nursing, and administrative staffs.
3. As is often stated: "Hospitals don't have patients--hospitals have doctors, and doctors have patients."
4. Hospitals have much self-inflicted personnel turmoil due to clinical rotation of residents and medical students, shift changes, and

extensive job rotations of nursing personnel for professional development. Considering that this occurs in addition to PCS and TDY, it is easy to understand why teambuilding efforts are fraught with difficulty.

5. Upgrading hospital technology ("the maintenance of the state of the art") presents much stress from the personal and organizational reorientations required to accommodate these changes (e.g., the acquisition of Nuclear Medicine technology required extensive job retraining, relocation of some sections, and realignment of responsibilities between Radiology and Internal Medicine Services).

6. Health care extenders are now providing medical care which has long been regarded as totally within the domain of physicians. Thus, struggles for professional autonomy and identity frequently occur among nurse practitioners, midwives, physician assistants, and physicians. Unfortunately, when energy is spent on acquisition and protection of territory, less is spent on patient care.

7. Professional conflict occurs when differences develop over which health provider groups should provide a particular service (e.g., psychiatrists vs. psychologists, obstetricians vs. pediatricians, OB residents vs. midwives).

8. In regards to sex roles, Dr. Mauksch, of the University of Missouri, says: "Physicians assume male roles and nurses assume female roles despite anatomical differences." A national trend is being seen as nurses are now asserting themselves, refusing to be the "doctor's handmaiden" (Time, 27 Aug 79).

9. In closing, I offer the following caveats for OESOs who will be working in MEDDACs:

a. Start-up strategy should effect coordination in the following order: hospital/MEDDAC Commanders, hospital Executive Committee, and the hospital/MEDDAC Executive Officer.

It is important to note that power over semi-autonomous medical nursing and administrative staff rests only with the Commander. By his direction or influence, OE efforts can be established across these staff boundaries. Therefore, his acceptance and actual use of OE is critical for institution-wide efforts.

Next, I highly recommend liaison with the hospital Executive Committee which usually consists of the CO, XO, Chief, Professional Services, and Chief, Department of Nursing. The Executive Committee can be considered the governing body of the hospital as it usually reviews minutes, facts on recommendations of other committees, sets long-range

hospital goals, and meets daily to exchange information and set priorities. Thus, liaison with this committee can be of great value in coordinating interdepartmental OE efforts.

Additionally, acceptance by each member of the Executive Committee will facilitate access to all major departments, services, and wards.

Finally, I recommend hospital/MEDDAC Executive Officer as point of contact for OE operations for two reasons:

(1) His managerial perspective/orientation (he is the only member with a non-clinical background), and (2) his authority to commit logical support to OE efforts.

b. To insure success, efforts must be made to engender support from the principal influence base in the hospital--the physicians. Success was achieved by using psychiatrists to co-facilitate workshops, by showing pay-offs of OE interventions, and by gaining personal acceptance, i.e., selling myself and my product.

c. Since problems in hospitals often transcend departmental boundaries, acceptance must be gained across nursing, physician, and administrative lines. Teambuilding sessions with department/service chiefs and top management have proven quite useful.

d. Continued viability of OE in hospitals depends on the strength of linkages with internal systems and resources. Linkage which create mutual support arrangements with such individuals as the Nursing Educational Coordinator, the Management Analyst, Hospital Chaplain, and Nursing Methods Analyst will provide more comprehensive and lasting improvements for the organization. These individuals will also make access and acceptance less difficult for the OESO. The MEDDACS Community Mental Health Activity and Social Work Service will also provide excellent resources for the co-facilitation of meetings and the conduct of training. It is felt these multidisciplinary approaches best solve the interdisciplinary problems of hospitals.

e. When conducting training in hospitals, be mindful that the predominant learning styles for health providers and administrators are characterized as "active" (Plovnick, 1975; Plovnick, Rubin & Fry, 1977). Their preference is for subject matter with a pragmatic, problem-solving orientation. Physicians are also characterized by "abstract-conceptual" learning preferences, indicating that material needs to be logically consistent, theoretically based, and backed by solid empirical evidence (Plovnick, Rubin & Fry, 1978).

f. Finally, OE interventions must be integrated into the basic goals and bottom-line concerns of the hospital. OESOs must facilitate acceptance of organizational goals in view of the tendency of health providers to focus on individual professional goals. The very best question the OESO can ask is: "How can we improve patient care?"

In summary, OE has a wide variety of applications in hospitals. Probably its greatest value lies in its collaborative techniques to integrate the efforts among the medical, nursing, and administrative staffs. And as I believe I have shown above, OE can be a valuable management tool for improving the problem identification and solving capabilities at all organizational levels.

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Suggested Format for Post-Transition Letter

SUBJECT: Follow-up on Transition Meeting

TO EACH PARTICIPANT

1. Just to let you know that while the transition meeting may be over, it is not forgotten. Some of the ideas developed there deserve to remain "fresh" in our minds.
2. First, I'd like to thank you personally for your contribution to an open and straightforward discussion of what you felt was important to the mission effectiveness of this battalion. I can assure you that your views have helped me considerably in my transition into my new role as your battalion commander.
3. Secondly, I would like to assure you that I have not forgotten your views on what issues I should be concerned about during my first six months in command. I have reviewed this list on several occasions already and will continue to do so periodically in the future.
4. From the notes on the butcher paper which you provided to me during the conference, I have attempted to summarize below what you expect from me and what I can expect from you:

INSERT EXPECTATIONS AND GOALS

I would like you to do several things with this list:

- a. Review it for accuracy and completeness and let me know if it requires revision.
- b. Put it under the glass or plexiglass on your desk, or some place where it is visible to both of us, and read it periodically.
- c. Be honest and straightforward in telling me and yourself where one of us is not living up to our end of the bargain. It can be me, "your" staff, or higher headquarters, but if I don't hear about it, I can't do much to help.

5. Thanks again for your cooperation, dedication and hard work. I feel we are off to a great running start as a team headed toward the goal of making the _____ battalion _____ Field Artillery an even prouder, more efficient combat unit. With your continued support and assistance, I feel certain that we can and will reach this goal and, at the same time, have a professionally and personally rewarding tour of duty.

(See MAJ Dave Kregar's letter on page 12.)

Coordination and Staffing Survey

This survey is aimed at getting your opinions regarding the quality of staffing and coordination conducted by members of the directorates and personal staff. The purpose of the survey is to identify what we are doing particularly well and also identify staffing routines which show a potential for improvement.

You should answer each question as honestly as you can so your answers, along with those of other staff members, will provide a good measure of our staffing and coordination practices.

The best answer is always just what you think.

Your answers are completely confidential. Except for the OESO, no one in this organization will see your filled-out survey. To be sure that your answers will not be identified, please do not write your name on the survey.

When you complete the survey, please return it to the OESO.

(See MAJ Tom Levitt's letter on page 12.)

Please indicate how much you Agree or Disagree with each statement. Each question should be completed by circling one of the numbers.

RESPONSE SCALE

- 1) I strongly disagree
- 2) I somewhat disagree
- 3) Neutral
- 4) I somewhat agree
- 5) I strongly agree

1. I understand the purpose of conducting an assessment of our coordination and staffing procedures 1 2 3 4 5
2. The physical location of the staff does not have any bearing on the coordination of actions between them . . 1 2 3 4 5
3. I prefer to coordinate "face to face" rather than over the telephone 1 2 3 4 5
4. I prefer to conduct coordination in writing rather than orally 1 2 3 4 5
5. Formal coordination (in writing) is an effective way to get the job done for this staff 1 2 3 4 5
6. I am satisfied with the degree to which coordination is practiced by the staff 1 2 3 4 5
7. Coordination is done voluntarily rather than being directed 1 2 3 4 5
8. The organizational structure fosters the coordination effort 1 2 3 4 5
9. As I see it, cooperation among all of the staff effectively achieves good staffing results 1 2 3 4 5
10. When I coordinate actions with other staff offices, they are provided sufficient time to evaluate and respond 1 2 3 4 5
11. The best level for coordination is at the directorate/personal staff level 1 2 3 4 5
12. The use of committees to conduct coordination among the staff is a worthwhile practice 1 2 3 4 5
13. Useful information is regularly shared between the various directorates/personal staff members 1 2 3 4 5

RESPONSE SCALE

- 1) I strongly disagree
- 2) I somewhat disagree
- 3) Neutral
- 4) I somewhat agree
- 5) I strongly agree

14. Cross-directorate/personal staff meetings are useful and worthwhile 1 2 3 4 5

15. When friction exists between two or more staff offices, the issue is resolved in the best interest of the Depot . 1 2 3 4 5

16. Lateral coordination is used to a greater extent than vertical coordination 1 2 3 4 5

17. I am convinced that "concurrences" and "non-concurrences" on staff papers are obtained based on the facts presented 1 2 3 4 5

18. In my opinion, the assessment of our coordination and staffing procedures is a worthwhile endeavor 1 2 3 4 5

19. When other staff offices coordinate actions with my office, they provide sufficient time for me to evaluate and respond 1 2 3 4 5

20. When another staff member presents a proposal to the Commander that has some effect on my office, you may be assured that prior coordination was made 1 2 3 4 5

21. All in all, each directorate/personal staff office practices the rule of good coordination 1 2 3 4 5

RESPONSE SCALE

- 1) Infrequently
- 2) Sometimes
- 3) Average
- 4) Usually
- 5) Always

22. To what extent is coordination conducted "face to face"? 1 2 3 4 5

23. To what extent is coordination conducted via telephone? . 1 2 3 4 5

24. To what extent is coordination accomplished formally (in writing)? 1 2 3 4 5

25. To what extent does physical distance between the various staff members affect coordination among them? 1 2 3 4 5

26. To what extent does cooperation exist among the staff? . . 1 2 3 4 5

RESPONSE SCALE

- 1) Infrequently
- 2) Sometimes
- 3) Average
- 4) Usually
- 5) Always

27. How often do cross-directorate/personal staff meetings take place? 1 2 3 4 5

28. To what extent are you called in early on coordination versus the "red hot stove" situation? 1 2 3 4 5

29. To what extent have you observed other staff members protecting their "vested interests"? 1 2 3 4 5

30. To what extent are you "coordinated with" unnecessarily? . 1 2 3 4 5

31. To what extent do personality differences affect staff coordination? 1 2 3 4 5

32. To what extent is coordination achieving the desired objectives? 1 2 3 4 5

Rosters

OESO Course 4-79

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TRAINING AND DOCTRINE COMMAND
 ORGANIZATIONAL EFFECTIVENESS CENTER AND SCHOOL
 TELEPHONE DIRECTORY
 AUTOVON: 929-XXXX 1 JANUARY 1980

TITLE	NAME	PREFERRED	OTHER NUMBERS		
<u>OFFICE OF THE COMMANDER</u> 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	
<u>OPERATIONS AND SUPPORT DIRECTORATE</u> ATXW-RMA-OS BLDG. 2843					
Director	LTC Sheffield	5919	4882	2606	
Adjutant	LT Holliday	2775	7197	3549	4716
Operations Officer	MAJ Armour	3549	2775	7297	4716
Operations Clerk	SP5 Suafoa	2775	7297	3549	
Admin Officer	Mr. Shiroma	3549	2775	7297	4716
Word Processor	Ms. E. Greene	3549	2775	4716	
Word Processor	Ms. Garwood	3549	2775	4716	
Xerox Specialist	Ms. Leon-Guerrero	3549	2775	4716	
Clerk/Steno	Ms. McCarter	5919	4882	2606	
Budget Analyst	Ms. Joe	6797	7911		
Supply Technician	Ms. D. Green	7911	6797		
NCOIC	MSG Tufono	3549	2775	7297	4716
Unit Clerk	SP5 Trujillo	3549	2775	7297	
Sidpers Clerk	SP4 Donaldson	2775	7297	3549	
Clerk/Driver	PFC Paxton	3549	2775	4716	
Maintenance Engineer	Mr. Baker	3549	1775	4716	
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Secretary	Ms. Moorehead	4574	4312	6013	
NCOIC	SFC Cudger	4574	4312	6013	
Chief Design/ Collection Division	MAJ Cooper	6013	4312	4574	
Evaluation Officer	CPT Plourde	4574	4312	6013	
Computer Programer	Mr. Nolan	4574	4312	6013	
Chief Survey & Measure Division	Mr. Savard	4574	4312	6013	
ORSA Officer	CPT Mitchell	4574	4312	6013	

TRAINING AND DOCTRINE COMMAND
ORGANIZATIONAL EFFECTIVENESS CENTER AND SCHOOL

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AUTOVON: 929-XXXX

1 JANUARY 1980

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Director	LTC Fisher	3519	4021
Secretary	Ms. Crouch	2889	3588
Librarian	Ms. Herrick	7228	6075
Librarian	Ms. McLaughlin	6075	7228
Instructional Material Specialist	SP4 Jones	4021	3519
Instructional Material Specialist	SP5 Smith	4021	3519
PreCommand Course Coordinator	LTC Bahm	3519	4021
Chief, Individual Skills Division	MAJ Lenz	3619	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 Pieret	4021	3519
Training NCO	MSG Svestka	4021	3519
Training NCO	SFC Pierre	3588	2889
Training NCO	SFC Morris	4021	3519
Training NCO	SFC Belasto	4021	3519
Chief, Consultant Skills Division	Mr. Goodfellow	4021	2889
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Training Officer	MAJ Fowler	4021	2889
Training Officer	MAJ James	3796	4675
Training Officer	MAJ Smith	3519	4021
Training Officer and Key Manager Course Coordinator	MAJ Kniker	3519	4021
Training Officer	Mr. McDuffy	2889	4021
Training Officer	MAJ Langford	4021	3519
Training NCO	SGM Cato	4021	3519
Training NCO	SFC Konarik	4021	3519
Training NCO	SSG Dunn	4021	3519

TRAINING AND DOCTRINE COMMAND
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<u>CONCEPTS DEVELOPMENT</u>	ATXW-RMA-CD BLDG. 2821				
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Secretary	Ms. 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) Hawks	7886	7885	7108	7106
Chief, Concepts Division	MAJ Jackson	7886	7885	7108	7106
Project Officer	CPT Price	7886	7885	7108	7106
Project NCO	SFC(P) Bartlett	7886	7885	7108	7106
Sociologist	Mr. Stanchfield	7886	7885	7108	7106
Chief, Research Division	(Proposed)				
Officer	(Proposed)				
Officer	(Proposed)				
Project Officer	(Proposed)				
<u>TRAINING DEVELOPMENT</u>	ATXW-RMA-TD BLDG. 2864				
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Secretary	Ms. McKinney	7058	6014	6019	7059
Chief, Curriculum Development	LTC Bradford	7058	6014	6019	7059
Project Officer	MAJ Speed	7058	6014	6019	7059
Project NCO	SSG McGuire	7058	6014	6019	7059
NCOIC	SFC Morris	7058	6014	6019	7059
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Writer/Editor	Mr. Britsch	7058	6014	6019	7059
Writer (Proposed)					
Chief, Analysis Division	MAJ White	7058	6014	6019	7059
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Education Specialist	Dr. Ferrier	7058	6014	6019	7059

Sources and Resources

Sources and Resources

L&MDC Content Outline and Trainer "Cue Card"

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Remember the first time you opened your L&MDC Trainers Guide to prepare for your first L&MDC? I do. I was completely overwhelmed as I turned pages looking for something familiar. I was eating the proverbial elephant one bite at a time, but I really wanted to see the whole critter and to know just what specific portion I was eating.

The solution for me was to go through the Trainers Guide line-by-line and make a note of every activity, such as an exercise or a lecturette. The result is the brief content outline of L&MDC that appears on the next pages. It's an expanded Table of Contents and, for me, much more.

I use the outline to review the flow of the week as I begin to prepare for training and as a handy way to see where I am during the training itself. (Once it saved me from launching into Wilderness Survival when it was time for the AGI Problem.) My co-trainers and I have used it as a planning tool for splitting up the training responsibility. We each have a copy of the outlines with our names written beside the blocks for which we have responsibility.

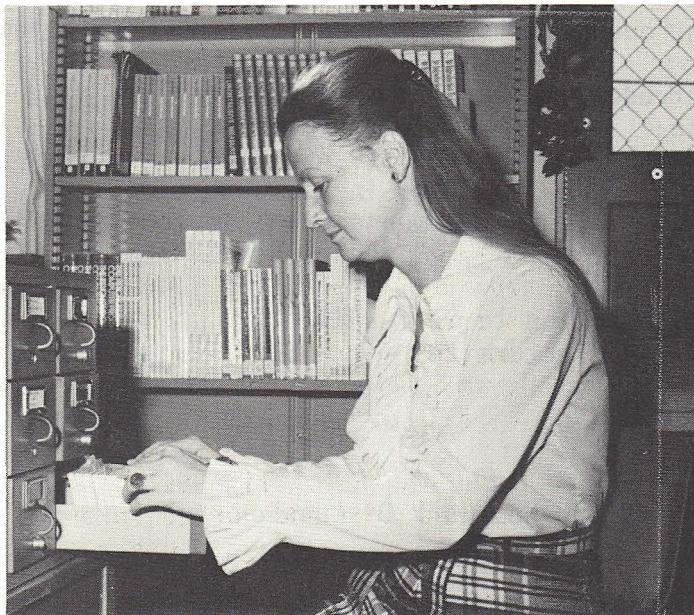
The only liberty I've taken in the outline is that in Module XIII I ask for critique sheets to be completed and turned in prior to the closure exercise. In the Trainers Guide the closure exercise comes first. Mea culpa.

Figure 1 is a sample of a technique that I adapted from MAJ Ken Burns. (Ken used 5x7 cards, but for a Librarian the only card size is 3x5.) As I prepared for my first L&MDC, I extracted from the Trainers Guide all the exercise instructions, sample process questions, models and other salient points and made brief reminders for myself on 3x5 cards. Since then I've added points and made modifications based on actual training experience. My stack of cards is about an inch thick, and is handier for me to refer to than is the Trainers Guide.

I use the stack to review the entire L&MDC in advance as well as to prepare to meet each day. If I'm "pitching" at the butcher paper, I usually lay the appropriate card in the marker tray of the easel. I don't always refer to it, but it gives me confidence that I'll pull through if my mind goes blank and I can't remember whether CONTENT or PROCESS goes above the TIME line. If my partner is "on", I scan my card so I can help out with added points. Tactfully, of course.

As each element of the L&MDC is completed, I shift to the bottom of the stack the card that applies to it and I'm prepared to forge on. Unless some clever soul announces a break.

I confess that my cards are hand written, not neatly typed like the examples on the next page. Maybe someday...



L&MDC Content Outline

Module I Introduction to Course and Self Knowledge

Unit A Introduction to Experiential Learning
Exercise: Mess Hall Cash Box
Lecturette: Process/Content Model
Learning by Experience Model

Unit B Student Expectations and Course Goals
Publish & Process: Achieves/Avoids
Course Goals

Unit C Guidelines for Group Learning
Publish & Process: Course Guidelines (HEROS +)

Unit D Admin Procedures

Unit E Student Self-Introduction
Exercise: Self Introduction or Peter-Paul

Unit F Model of Interpersonal Relations
Experiential Lecturette: Johari Window

Module II Introduction to Communication Process & Effective Feedback

Unit A Introduction to Effective Feedback
Exercise: Names/Impressions
Lecturette: Effective Feedback
Steps in Communication
Communications in Conflict Situations
("Transcendence Theory")

Unit B Introduction to Self-Reliance
Experiential Lecturette: "Self-Reliance"
(I Have to... I Choose to...)

Unit C Homework

Unit D Review and Homework Discussion

Module III Group Development Theory and Practice

Unit A Group Member Inclusion
Exercise: Closest to/Most Distant from or
Graphic Display of Group Membership
Lecturette: FIRO Theory (I, C, A)

Module IV Communication Skills

Unit A Communication Modes

Lecturette: Three Modes of Communication

Unit B Introduction to Effective Listening

Experiential Lecturette: Parrotting, Paraphrasing,
Active Listening

Module V Management of Conflict

Unit A Competition and Collaboration

Exercise: AGI Problem

Lecturette: Win/Lose

Module VI Teamwork

Unit A Teamwork

Exercise: Wilderness Survival

Lecturette: Synergy

Unit B Homework

Unit C Processing Homework Assignment

Module VII Management Theory

Unit A Influence and Control

Exercise: Influence Voting

Lecturette: Power, Leadership and Authority (P, L, A)
(optional: Situational L'ship Theory)

Unit B Work Group Development

Publish & Process: Functional Roles of Group Members

Unit C Homework

Unit D Discussion of Homework

Module VIII Performance Counseling

Unit A Performance Rating & Performance Counseling

Exercise: Performance Rating

Lecturette: Performance Counseling
"I" Message

Unit B Conducting Performance Counseling

Experiential Lecturette: Using "I" Messages in Counseling

Module IX Personal Counseling

Unit A Goals and Conditions of Effective Personal Counseling

Lecturette: Personal Counseling (Non-Directive)

Role-play (trainer on group)

Role-play (trainers on sub-groups)

Role-play (student triads)

Unit B Homework

Unit C Discussion of Homework

Module X Goal Setting and Action Planning

Unit A Goal Setting and Action Planning

Lecturette: OMR Model

Exercise: Personal Goal Setting and Action Planning

Module XI Introduction to Organizational Effectiveness

Unit A Introduction to Organizational Effectiveness

Lecturette: Organizational Effectiveness

(Systems Model and Four-Step Process)

Module XII Back Home Application

Unit A Work Group Application of Course Materials

Publish & Process: Expectations

Lecturette: Re-entry

Module XIII Critique and Closure

Unit A Closure

Publish & Process: Course Critique

Exercise: Closure Poster

MODULE I INTRO TO COURSE & SELF KNOWLEDGE
Unit A Intro to Experiential Learning

EXERCISE: MESS HALL CASH BOX

Intro: (brief, structured) "We'll begin with an exercise designed to give you an idea of what this course is about"

Procedure:

Pass out Mess Hall Worksheet to each student

Students read narrative & complete questions (10 min)

Divide group in half. Task each group to develop one set of answers for group on new Worksheet.

(Don't mention consensus - that's later.) (15 min)

Regroup. Read correct answers to group.

(#3F, #6T, rest?)

Brief discussion of answers for clarity.

Process: (sample questions) (use those that fit)

What assumptions were made?

How was leadership decided?

How did individual members participate?

(Who most, who least, who led, who changed?)

How were decisions made?

How were disagreements dealt with?

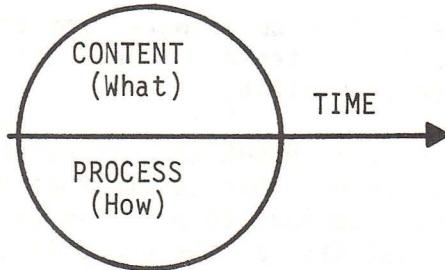
How was group answer determined?

Conceptualize: How could individuals act differently to improve effectiveness?

MODULE I INTRO TO COURSE & SELF KNOWLEDGE
Unit A (continued)

LECTURETTE: PROCESS/CONTENT MODEL

Intro: This is a model for looking at interactions, such as the last exercise.



Usual emphasis: what the task is, what is being said, what is being done.

L&MDC emphasis: how the task is being accomplished, how communication goes on, how people interact.

FIGURE 1
L&MDC TRAINER CUE CARDS

The last timesaver that I offer for your consideration involves the handling of homework assignments.

On the next page is a sheet that I use as a handout at the close of the first day. I've found that having the homework assignments written out reduced the end-of-the-day flurry and also reduced the number of misunderstandings about the assignments. I ask participants to keep the sheet with their Student Handbooks so we can refer to the sheet at the close of each day's activities.

I used the Homework units from the Trainers Guide as the basis for my list and I grouped the assignments accordingly, leaving a space between groupings. (Homework units are Module II, Unit B; Module VI, Unit B; Module VII, Unit C; and Module IX, Unit B.) There is one drawback to making clear-cut groupings and it applies to those of us who fall behind in the design. (There's an unconfirmed rumor that I'm not alone in this.) Since homework for L&MDC is only to be assigned after the activity to which it relates has been experienced in the group, I skim the list each afternoon to be sure I don't assign readings that apply to activities this group didn't get to that day. For example, if on the second day we haven't gotten to Wilderness Survival, I don't assign "Basic Skills for Creative Conflict Situations" by Pates. I ask the group members to transfer that reading down to the next group and I assign it with the homework at the end of the next day.

In compiling this list I made some changes and modifications to the Homework units in the Trainers Guide:

- 1) "Intrapersonal Conflict Resolution" by Pates is not listed in the Trainers Guide, Module II, Unit C. It is referred to at the end of the Experiential Lecturette on Self-Reliance in the preceeding unit. It doesn't appear in either the Student Handbook or the Trainers Guide and some trainers skip it entirely.
- 2) "Defensive Communications" by Gibb is included in the homework assignment of Module II, Unit C, but I think it applies best to conflict situations so I assign it with homework at the end of the second day. It also doesn't appear in either the Student Handbook or the Trainers Guide.
- 3) "Non-Directive Personal Counseling" was left out of Module IX, Unit B in the Trainers Guide.
- 4) I've reworded some of the questions to be answered and the instructions for practicing active listening. Guess it's a function of my undergrad degree in English.
- 5) Pages 64 to the end of the Student Handbook are not referred to in any homework assignment. Rather than assume that everybody reads them after L&MDC is over, I decided to put them on my list (last grouping). On the last day, as the group is talking about work applications of the L&MDC, I suggest that they read the rest of their Student Handbooks as one way of continuing their learning.

HOMEWORK -- L&MDC

DAILY: Complete personal journal entries.
(See suggested format in L&MDC Student Handbook.)

"Thinking and Feeling" Banet pp. 27-28
"Congruent Sending" Hansen pp. 29-30
"Communications in Conflict Situations" pp. 31-35
"The Awareness Wheel" Miller, Nunally & Wachman pp. 36-40
"Feedback" p. 41
"Intrapersonal Conflict Resolution" Pates (handout)

"Paraphrasing" "Active Listening" pp. 42-48
"Win/Lose Situations" Wiley pp. 49-52
"Basic Skills for Creative Conflict Management" Pates pp. 53-59
"Defensive Communications" Gibb (handout)

Answer the following questions in writing:

- 1) Concerning this L&MDC group, what level of group development do you think the group has attained according to the FIRO Theory (I,C,A)? Give examples to support.
- 2) Concerning activities in this group to date, what conflicts have you experienced or observed that were not dealt with?

Practice active listening skills in conversation with one or two people. Note and be prepared to report on the results.

Answer the following questions in writing:

- 1) Concerning the management styles of power, leadership and authority, which have you used most often in work situations? Give explanation.
- 2) Which styles have you used the least? Give explanation.
- 3) In what way(s) could you effectively use other modes?

Based on the status of this L&MDC group at present, complete the form "Rating Group Effectiveness" pp. 25-26.

"I Messages" p. 60
"Helpful Hints for Counselors" p. 61
"Performance Counseling" p. 62
"Non-Directive Personal Counseling" pp. 62-63

Complete in writing the following assignment:

- 1) Describe in objective terms (what? when? how?) a work related function of one of your subordinates.
- 2) Develop a performance objective from that description.
- 3) Structure an "I" Message for this subordinate in the event of:
 - a) Satisfactory completion of the objective.
 - b) Unsatisfactory completion of the objective.

Employ the personal counseling technique of active listening with one or two people. Note and be prepared to report on the results.

"Managerial Strategy -- the OMR Model" pp. 64-69
"Management by Objectives" Thomson pp. 71-74
"Managers Manage Motivation; They Don't Motivate" Silber pp. 75-84
"Writing Specific Objectives" pp. 85-99
"How to Sustain Learning" p. 100
"A Description of the Four-Step Process" pp. 101-102

OESO/OENCO SAMPLE CALLING CARD

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A professional-looking, well-designed calling card could be a useful tool for some OESO/OENCOs. A business card usually makes a good impression on those to whom it is presented, provides a handy reference to the OESO/OENCO's name, rank and phone number, and reinforces impressions created during the initial personal contact.

Whether or not an OESO/OENCO chooses to use a calling card is strictly his personal business. There certainly is no requirement to do so. If a card is used, however, it should be carefully designed so that it falls within the boundaries of "good taste", and that it presents a "professional" image of the OESO/OENCO.

Individuals desiring business cards are, naturally, responsible for arranging for the printing of the cards, using their personal resources. Since prices for such work vary widely, and since most OESO/OENCOs probably have little training or experience in graphic design, the following bits of advice are offered for consideration.

CHOICE OF CARD PAPER STOCK

The rule-of-thumb here is to pick a card color that will not be ostentatious. Simple black lettering on a white card is the most acceptable choice, but other pastel colors of card stock can sometimes be used very effectively.

CHOICE OF TYPE-FACES

Most printing shops have samples of type from which to choose, and usually allow three (3) different faces on the same card without extra charge. Elaborate, hard-to-read type, (such as "Old English") should be avoided in the interest of legibility.

COST OF PRINTING

Prices vary widely. There are lots of "quick-printing" shops that usually offer the best prices. A reasonable range of prices is from a very low of \$15 (per 1,000 cards) to as high as \$50 when various colors,

special folds, and embossing are called for. Some good advice here is to call four or five shops, and then visit the ones which quote the best price and ask to see samples. Many shops have graphic arts personnel to assist in designing the card. You can prevent some problems in communication by taking with you a rough sketch of your own idea.

NUMBER OF CARDS

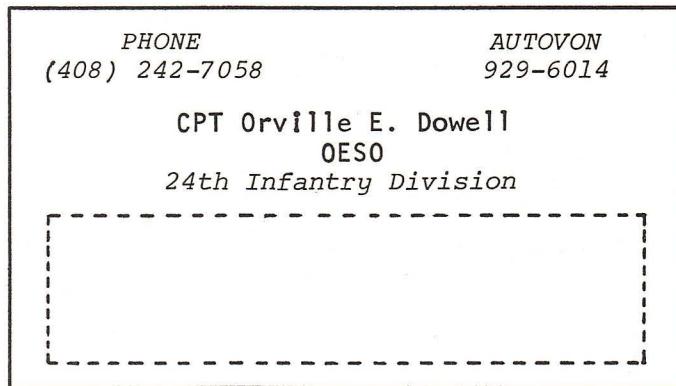
Printers will usually quote prices based on printing runs of 500 or 1,000. Before you decide to print 1,000 cards, consider the fact that your assignments and address in the military are subject to change rather abruptly sometimes, and it takes a long time to use up even 500 business cards.

DESIGN

The following design is presented as a basic guide, for your convenience. The quote from General Meyer is an added touch (for OE promotional purposes, of course) which you might consider, realizing, however, that it will involve extra cost in printing. The quote was taken from an Army News interview with General Meyer, Army Chief of Staff, on 23 October 1979. This design is intended mainly as a method of starting your ideas in the right direction. The Communique is interested in receiving some of your own cards which could be featured in the publication sometime in the future.

This design allows the quote from General Meyer to be printed in fine type and in the area just below the name of the OESO/OENCO.

The dotted lines mark the area to be used, but the dots should not be printed on the actual card.



If reduced 40%, this copy of the quote can be used as camera-ready art.

...."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 piece of equipment will become more and more important. This will be particularly true in years of reduced resources such as dollars and manpower."

General Edward C. Meyer
Chief of Staff, Army
23 October, 1979

Have You Given It Any Thought?



Since you left OECS as a qualified 5Z, you have rubbed shoulders with a lot of people in a variety of situations. No doubt, some of these people impressed you with some of their ideas, attitudes, and abilities. Have you given any thought to the possibility that they might make a good OESO/OENCO?

OECS encourages you to submit the names, Autovon numbers, and addresses of good prospects for 5Z training. Mail them to us, call us (Autovon 929-6014/6019), or use the convenient tear out form included here, which can be given to an individual who is interested in obtaining more information about the program.

Name _____ Rank _____

Present Assignment _____

Correct Mailing Address (please include zip code) _____

I am am not an OESO/OENCO.

Telephone: (Commercial) _____

(Autovon) _____

I'm interested in learning more about becoming an OESO/OENCO.
Please send information.

MAIL TO:

COMMANDANT
U.S. Army Organizational Effectiveness
Center & School
Fort Ord, CA 93941

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