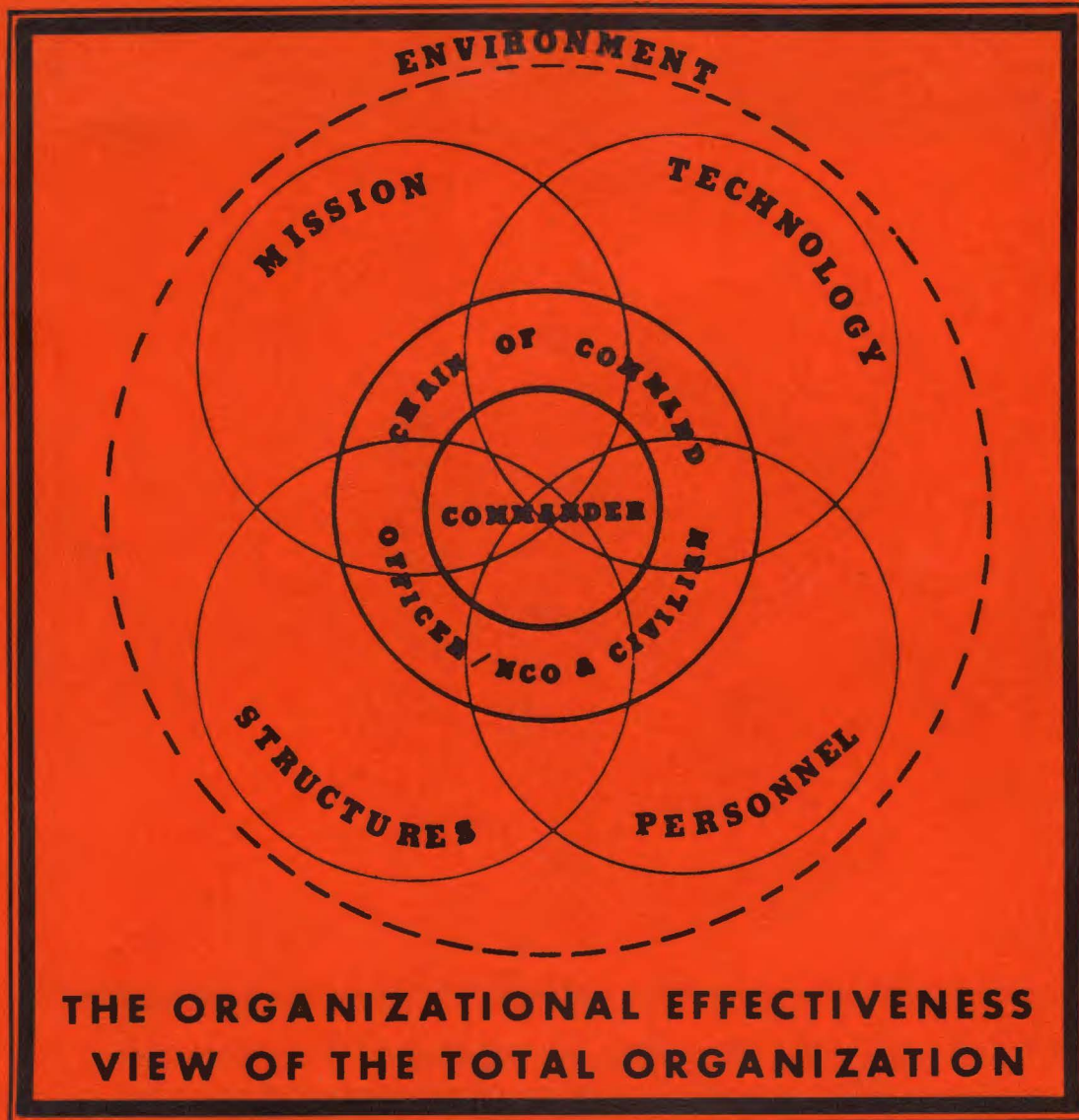


COMMUNIQUE

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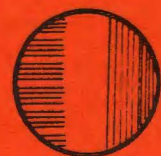
USAOETC Bulletin

July 1978



**U.S. ARMY TRAINING AND DOCTRINE COMMANDS
ORGANIZATIONAL EFFECTIVENESS
TRAINING CENTER**

FORT ORD, CALIFORNIA



THE SYSTEMS VIEW OF THE TOTAL ORGANIZATION

Perhaps the most difficult and complex organization to manage and lead is the military. Central to the successful leadership and management of the military organization is an understanding of the interaction of the systems that comprise the organization. To assist in the leadership and management of the military organization, and to develop a view of the complexities of the organization, an understanding of the systems-view of an organization is essential. To graphically portray the systems view of an organization, we have adapted and utilized the writings of F. E. Kast and J. E. Rosenzweig's Organization and Management - A Systems View.

On the front cover of the communique is a visualization of the total system and the continual, mutual, interaction of the subsystems in military organizations. This simple model places the commander in his appropriate role at the center of the subsystems. It is deliberately represented as superimposed over the other subsystems because this is the place of the commander and his management structure - linking and influencing all the subsystems. Surrounding the commander is the chain of command subsystem comprised of the subordinate officers, noncommissioned officers and, in many cases, the civilians who hold leadership positions within the organization. The largest subsystem of an organization is the environment or climate. It is here that one can sense higher headquarters influencing the organization. The installation, as well as the local community, are two other elements that contribute to and influence organizational life. All of the subsystems are susceptible to and influenced by the environment in which it finds itself. Mission represents another subsystem. Included in this subsystem are goals and values which make up an organization and determine what it is and does. The structural subsystem is made up of two groupings: formal reporting relationships, such as TO&E and TDA, and the informal relationships of personnel within the organization. The personnel in an Army unit make up the real heart of the organization and we see them as individuals and in groups. Finally we have the technological subsystem which is represented by equipment, material, SOPs, tactics, and operations of a unit.

Inherent in the systems view of organizational effectiveness is the realization that no subsystem or element, of the organization can change without simultaneously changing all of the other subsystems in sometimes unexpected and unpredictable ways. The successful practice of organizational effectiveness hinges on this basic understanding of organizations. Organizational effectiveness operations view every organization from the total systems approach, and are directed towards improving the entire organization, leading ultimately to more effective unit performance and greater combat readiness.

Submission date for articles for the
next issue of the COMMUNIQUE is
11 September 1978. All articles
submitted for publication in the
COMMUNIQUE should be mailed to:

Commander
USAOETC
ATTN: Editor, OE COMMUNIQUE
Fort Ord, California 93941

The opinions and conclusions herein, are the view of the
individual contributors, and do not necessarily reflect the view,
opinion or conclusion of the Commander, USAOETC. Reference to
articles in this publication must include the above statement.

OE COMMUNIQUE July 1978

COMMANDER'S COMMENTS

This is our fourth edition of the OE Communique and we continue to hope it is meeting the needs of the OESO in the field. Once again, I will use the Commander's comments to update the field as to what is happening at OETC and provide some information about the progress of OE in the Army. As we all know, OE is no longer in the embryonic state. It is mature, prospering, and making a valuable contribution to combat readiness.

Beginning with this issue of Communique we will include feedback from the professional development workshops attended by the staff and faculty of OETC. This issue contains comments about OD 78. We would also be very interested in hearing about, and publishing, your professional development activities. NCO augmentation is currently underway. We have eleven male NCOs and one female NCO attending Class 3-78. These first class, high quality NCOs will be joining the staff and faculty following graduation.

The expansion of the OETC library and learning center resources continued during the last quarter. We have many technical reports, audio-visual cassettes, 16 mm films, and six new carrels. Again, as a reminder, the library is there not only to serve the students at OETC, but also to serve as a loan facility for graduates. Of particular note is a new video tape by General Starry entitled "Sergeants' Business", TASO film #909-777-0819-B - a most valuable vehicle to define the duties and responsibilities of the NCO. Check with your local TASO or service school ETV facility about acquiring this film.

Currently, there are two classes in session. Class 2-78 graduates 30 June and Class 3-78 is scheduled for graduation in August. Class 4-78 is scheduled to begin 21 July with the starting date for our last class for FY 78 scheduled for 25 August.

Subsequent to our last edition, the American Council on Education also visited Fort Ord. After evaluating our curriculum, they recommended that sixteen graduate-level semester hours be awarded to all students who have attended the OESOC. The letter authorizing these graduate level credits or credit hours will be sent to each OESO. It is hoped that you will keep OETC informed as to what actual credit hours are awarded when OESOs apply for masters degrees programs. Please keep us posted on this particular subject.

The commanders' Guide to OE is also out in the field. The initial 5,000 copies have been depleted; a second edition of 5,000 copies will be ready for distribution in July. Action is being taken to place the "Guide" into the Army's Pinpoint Distribution System. We would also

like to know the first year requirements from the TRADOC Service Schools for student issue; we can assist the schools in obtaining a prompt issue. Our LMDTC Instructors' Guide is also completed and is presently being prepared to send to the printing office.

OETC is scheduled to teach a key managers course for FORSCOM in July 78. A key managers course for the other MACOMs, excluding FORSCOM and TRADOC, will be scheduled in the August-September time frame.

A Transition Model is also available now for use by OESOs in the field. It is currently at the printer's and will be distributed to OESOs in the field when ready. This is a one-day package that has been proven successful at many locations.

The OETC curriculum evaluation will also begin this month. It is an external evaluation of OETC, contractor supported by the Army Research Institute.

The contract for upgrading OETC facilities has also been approved and money has been allocated. Classroom upgrading will commence in August.

The Phase III evaluation plan is proceeding on schedule. Faculty members are currently in Europe collecting the data which should finalize the Phase III collection effort. Results of this evaluation will be forwarded to each OESO following reduction and classification of data. OETC was also represented at the General Officers Steering Committee meeting held in Washington during June. Results of this meeting will be published for your information. Also for your information, there is a 3-10 year plan which deals primarily with the future of OE. Copies of this plan, although in draft form, can be procured upon request from OETC.

OETC is beginning to receive case histories on OE operations from field OESOs. Your continued support of this important program is requested.

All in all, as we reach the point of mid-year 78, we see that OE is progressing slowly, being implemented pragmatically, and enhancing the Army effort to improve combat readiness.

Appreciate your continued support and efforts in this most important endeavor.

COL Palmer

ARMY-WIDE OE UPDATE

DEPARTMENT OF THE ARMY

Pending revision of TB IGI, ODCSPER, DA, has developed interim OE inspection guidance. A number of specific items have been established to serve as indicators of systemic soundness and design efficiency within the Army's OE program. IGs can use these items to assess program results within their commands or agencies until the total program evaluation currently being studied by HQ TRADOC and the Army Research Institute is completed.

Inspection Guidance for Organizational Effectiveness (OE) Offices

1. In the inspection of separate brigade (or equivalent size units), division, installations, or higher level activities which are required to have an Organizational Effectiveness (OE) capability, the IG should determine whether:

a. AR 600-76, Organizational Effectiveness (OE) Activities and Training (1 Jan 78), is available for HQDA policy and guidance.

b. Minimum validated staffing structure has been provided as specified in AR 600-76. Two Organizational Effectiveness Staff Officers (OESOs) per installation/division and one per separate brigade or equivalent, and that positions are either filled or on valid requisitions.

c. Personnel assigned to validated positions have received an Organizational Effectiveness Training Center (OETC) validated ASI 5Z. This ASI is obtained either through resident attendance at the Organizational Effectiveness Staff Officer Course (OESOC) or through the OETC Alternate Designation Procedure (AR 600-76).

d. The validated space is located, as specified in AR 600-76, either in personnel management section (SI, GI, DPCA, HRD), office of chief of staff, or office of commander.

e. Resources for additional professional training in the OE area are being made available. (AR 600-76)

f. Necessary administrative support to include office space, and secretarial support, is being provided.

g. The OESO is able to function full-time in the area of OE as opposed to being HRD chief, special projects officer, or in other non-OE role. (AR 600-76)

2. Additionally, in the inspection of TRADOC school/training activities which are required to have an OE capability, the IG should determine whether -

a. The school OESO is familiar with 1 September 1977 HQ TRADOC letter on quality assurance, has been consulted on quality improvements, has made suggestions, and is actively involved in preparation of instructional material and instructors.

b. The OESO is in contact with training developers, evaluators, and those who run special training programs to familiarize them with concept of OE and the content of the OE modules. (1 Sep 77 HQ TRADOC Ltr)

c. The school OESO is involved in at least one OE operation, either running it or helping another OESO. This work takes not more than about 25% of his time. (1 Sep 77 HQ TRADOC Ltr)

d. The OESO is the primary instructor for the modules of the role of the OESO, the organizational processes with which an OESO works, and the 4-step OE process. The actual breakout of time on this will vary, according to how schools have modified the modules, and which module is being taught. (1 Sep 77 HQ TRADOC Ltr)

e. The school is following TRADOC guidance not to teach OE without either an OESO being assigned or having an OESO come into the school to teach the module. (1 Sep 77 HQ TRADOC Ltr)

f. Because of the long requisition cycle for OESOs, the school has a long-range plan for maintaining OE expertise. (1 Sep 77 HQ TRADOC Ltr)

USAOETC

GRADUATE CREDIT FOR OESOC

1. The Office on Educational Credit (OEC), American Council on Education, conducted an evaluation of the Organizational Effectiveness Staff Officer Course (OESOC) during April 1978 to determine its equivalent educational credit. The OEC rendered the following credit recommendation:

Title of Course: OESOC

Applicable to: All course graduates from April 1976 to the present.

Length: 16 weeks

Recommendation: At the graduate level, 6 semester hours in organizational development; 6 semester hours in practicum and seminar in organizational development; and 4 semester hours in leadership and personal skills development.

2. This credit recommendation was received too late to be published in the 1978 Guide to the Evaluation of Educational Experiences in the Armed Services but will be announced in the next OEC newsletter. The credit recommendation will be supplied to interested parties upon request to the American Council on Education, One Dupont Circle, Washington, D.C. 20036.

Training Development Directorate

OETC's Training Development Directorate was established and staffed December 1977. Its mission is to:

(1) Analyze the tasks of the OESO, OENCO, Survey Officer, LMDC trainer, etc., break the various tasks down to skills required, develop learning objectives, POIs and lesson outlines.

(2) Produce test books, non-resident courses, video and audio cassettes, films, and slides to support OE in the Army.

Projects:

OE Communique - A quarterly publication for sharing information

OESO Handbook - Mailed to practicing OESOs 28 April

Service School OE Modules - Distributed in the summer of 1977, presently being redesigned.

OESO Task analysis - Initial work began April 1978. Will continue throughout FY 78/79 by OETC and Army Research Institute representatives.

OENCO course - Job analysis being completed.

Commander's Guide to OE - Soon to be released as a field manual

The Training Development Staff is currently planning eight audio visual productions. The productions will be on 3/4 inch television tape cassettes. The programs are designed to augment the Service School OE Modules and to assist OESOs in the field.

Scheduled for production are TV tapes on "What is OE," the Transition Model, Systems Theory and OE, Assessment, Planning, Implementation, Evaluation/Follow Up, and the OETC Command Briefing.

Programmed (Self-Pace) texts:

Publication of mini-courses as part of an on-going series that teaches OE-related leadership and management techniques to the non-resident student.

Contacts:

Mel Spehn, PhD - Director

Bob Brown, LTC - OENCO Course

Kieran McMullen, CPT - OESO Course

Steve Ferrier, PhD - Survey Officer Course

Paul Rock, MAJ - Training Literature

Bob Britsch - Writer/Editor

Sharon (Gallatin) James, PhD - Video/Audio/Film

Telephone AV 929-7058/7059

CONCEPTS DEVELOPMENT DIRECTORATE

The Concepts Development Directorate (CDD) was formed and staffed December 1977. Its mission is to:

(1) Conduct cutting edge OE activities/technologies, engage in research and practical field experience, and formulate OE doctrine.

Completed -- Design and implement series of Key Manager Courses.
-- Plan, design, and implement post and division-wide OE activities.

- Conduct OE activities in major school environments (National Defense University).

- Planned
- Additional Key Manager Courses as needed.
 - Design/implement OE training for brigade/battalion designees.
 - Study/evaluate the use of OE technology in the ROTC, National Guard, Reserves, and Recruiting activities.

(2) Introduce scientific/technological advancements (academics/industrial).

- Completed
- Adaptation of Transition Meeting Design for Army needs.
 - Attendance and participation of OD 78 conference.
 - Adaptation and application of Open Systems Planning.

- Planned
- Continued liaison with Jack Sherwood, Berwyn Fragner, Mike Mitchell, Stan Herman, and other leading OE consultants.

(3) Maintain liaison with education, business, and other military services involved in OE/OD.

- Completed
- Design and conduct of National Guard OE Committee Planning Workshop.
 - Participation in Naval Human Resource Managers Course.
 - Attendance and presentation at Interservice Conferences on OE/OD.

- Planned
- Study/evaluation of Air Force Job Enrichment Program.
 - Study/evaluation of Navy Human Resource Manager Program.
 - Liaison/study of civilian industry to include: TRW Systems, General Motors, Dow Chemical, Sears, SAGA Foods, etc.
 - Study/evaluation of OD applications within the Israeli Defense Force and the Swedish Army Forces.
 - Monitor, plan, and adjust OE activities/instructions within the National Defense University, Army War College, Command and General Staff College, and US Military Academy.

(4) Review OE techniques developed in the Army MACOMs. Review OE Surveys.

- In-Process/Completed
- Effect of life planning workshops of Retention.
 - Success/failures.
 - Trainee survey.

- Planned
- Evaluate the application of OE technologies to medical settings.

(5) Assist Training Developments and Training Directorate in the integration of approved OE doctrine into 16 week course and other Army schools.

- In-Process/Completed -- Applicable case studies.
- Management Responsibility Guide.
- Transition Meeting Design.
- Action Research in support units.
- Introduction for modules into the US Army Sergeants Major Academy.
- Inputs for SURVEY Officer Course and SURVEY Data Processing Course.
- Planned -- Introduction of OE technology to the Academy of Health Sciences and the Defense Race Relations Institute.

(6) Generate futuristic OE applications.

- In-Process/Completed -- OE in combat.
- Micro-Systems (Division-wide operations).
- OE SURVEY system coordination.
- Planned -- Job enrichment.
- Job design.
- Industrial advancements.

Contacts:

- | | |
|-----------------------|-----------------|
| (1) Gerald Pike, LTC | Director |
| (2) Bill Sawczyn, MAJ | Project Officer |
| (3) Tom Fahey, MAJ | Project Officer |
| (4) Bill Ritter, MAJ | Project Officer |
| (5) Dick White, MAJ | Project Officer |
| (6) Tom Hawks, CPT | Project Officer |

Telephone AUTOVON 929-7885/7886

TRAINING DIRECTORATE

1. The major mission of the Training Directorate is to "train quality OESOs." All of our energies are dedicated to this end. In working to achieve this objective we are continually making improvements in "content and process" of the directorate, based on our own four-step OE process.
2. The Training Directorate is presently organized into five instructional divisions and an operations division that oversees the Library and learning center. The instructional divisions and the division heads are as follows:

Individual Skills Division - LTC Fisher

Organization Skills Division - LTC Bradford

Consulting Skills Division - LTC Looram

Managerial Skills Division - LTC Van Eynde

OESOC 3-78 will be on FTX during the period 13 July to 16 August. The Training Directorate is interested in lining up future FTX sites. Interested OESOs/Installations are invited to contact OETC. Future FTX dates are as follows:

| | |
|------------|--------------------|
| Class 5-78 | 2 Nov - 6 Dec 78 |
| Class 1-79 | 15 Mar - 18 Apr 79 |
| Class 2-79 | 17 May - 20 Jun 79 |
| Class 3-79 | 5 Jul - 8 Aug 79 |
| Class 4-79 | 13 Sep - 17 Oct 79 |
| Class 5-79 | 1 Nov - 5 Dec 79 |

3. While the above accounts for the immediate present, some future projects include:

- a. A program of research is to be conducted by the ARI and sponsored by the OETC, for an external evaluation of the OESO course to ensure that the COI meets the current needs of the Army and that the course is abreast of the latest developments of the civilian OD professional community.

- b. We have initiated the criteria referenced instruction format in a portion of the OESO Course. In the near future, it is our plan to have all faculty in the Training Directorate graduates of the CRI course at the Defense Language Institute and to convert our training materials to that format.

- c. We are making greater use of audiovisual materials in the course of instruction and have started to use video tape recording in certain portions of the classes. Several new items of AV equipment have been ordered to include the Sony Rover TV systems.

EVALUATION DIRECTORATE

USAOETC ORGANIZATIONAL EFFECTIVENESS Evaluation Program: Phase III Update

LTC Ocsar C. Mack
Director, Evaluation
USAOETC

1. BACKGROUND:

USAOETC is currently conducting Phase III of the five-phased OE Evaluation Program. Phase I addressed the question of how OE was being accepted by the Army during the early stages of the development of the OE effort. Phase II surveyed a broad segment of the Army to learn what training revisions are necessary for OETC to make in the OESO course, what types of Army educational programs are needed to gain support of OE and how best to assign OESOs for maximal impact. These first two phases covered the period November 76 - October 77. The information collected was presented to the General Officer Steering Committee following Phase I and again at the end of Phase II and was made available to OE policy makers and action officers to provide factual data and trends on the Army-wide OE program.

Phase III is using an approach that is very different from the two earlier phases. The primary goal of Phase III is to develop a method of measuring an organization's ability to accomplish its assigned mission, i.e., its organizational effectiveness. Phase III should also provide the capability to measure an organization's mission effectiveness before and after an OE operation to determine if the desired change was made in the organization. The ability to measure an organization's mission effectiveness is needed in Phases IV and V of the OE Evaluation Program. In Phase IV the goal is to tie together OE techniques with the type of organization and the organizational situation in such a way that following the assessment of an organization the OESO will know which implementation techniques should be used. Phase V will make use of the data collected in all five phases to provide information that will allow informed judgments to be made about the cost-benefit/effectiveness of OE by those in appropriate positions.

2. OBJECTIVES:

As stated, the primary goal or objective of Phase III is to develop a measure of an organization's mission effectiveness. Data collection was accomplished by surveys, interviews and observations, each specifically designed to collect the required types of information. Since the data were collected by several different instruments and will be combined during analysis, this consolidation of instruments and techniques is

referred to as the Organizational Mission Effectiveness Assessment System (OMEAS). The plan is to develop an assessment system that will be valid, and reliable and that will: provide useful information to the commander; be capable of assessing each organization only against its specific assigned mission; be potentially useable by OESOs. (The primary goal, again, is to develop a measurement instrument for the purposes of the evaluation program. Usefulness to OESOs will be a spin-off of this part of the evaluation program, if successful. However, further development will be necessary at the conclusion of Phase III to make the assessment system maximally useful to OESOs.)

In addition to the advantages and capabilities of the assessment system previously noted, the system will also allow for comparison of units with the same mission in terms of their organizational mission effectiveness. (all information collected by the OESOs and/or OETC will be kept confidential and anonymous.)

3. CURRENT STATUS:

The development of the OMEAS requires an indepth, intensive survey of selected Army units. The test units selected provide diversity of fundamental missions, diversity of location and a sufficient cross section of the Army to determine if development of a valid assessment system is feasible.

For Phase III, participants from 2 combat brigades, 1 support battalion, 1 division support command (DISCOM) and 3 basic training brigades were surveyed. Thirteen thousand five hundred sixty (13,560) questionnaires were returned, 510 interviews were held with command and staff personnel down to company level (officers and non-commissioned officers). Direct observation by OETC team members with the assistance of OESOs was also accomplished. Data of the following types were collected from participating units: Readiness Status; Unit Readiness Reports; IG Reports; Personnel Reports; Training Reports and Equipment Status Reports. An attempt was made to collect information from as close to 100% of the unit personnel as possible.

Data collection was completed 1 July 1978. Because of the huge volume of data gathered and the complexity of the processing and analysis of the data it is estimated that initial findings and results will be available in approximately 90 days.

4. METHODOLOGY:

Phase III data will be used to develop criteria against which the organization's effectiveness can be measured. Specifically, these criteria will measure the organization's ability to:

- a. Open options and permit choice.

- b. Monitor its own functioning.
- c. Communicate openly.
- d. Maximize effective/efficient use of resources.
- e. Direct resources and behavior toward a goal.
- f. Solve problems.
- g. Correct or modify non-productive approaches.
- h. Recognize and respond to needs for change.
- i. Balance social exchanges.
- j. Enhance self-esteem.
- k. Enhance individual commitment.
- l. Enhance individual competence.

Available OE evaluation data from ARI studies and other Army agencies engaged in OE type evaluation efforts were incorporated in the Phase III data collection and the findings from these data will be used to help validate the Phase III results. General overall results and findings of Phase III will be available to ARI and then other Army agencies for comparison with their data.

5. FURTHER DEVELOPMENT OF THE ASSESSMENT SYSTEM:

If Phase III results indicate that the OMEAS can provide useful data to OESOs the data collection can be streamlined and reduced to the important elements as determined by detailed analysis. The goal of further development would be to provide an assessment system which is a valid indicator of organizational mission effectiveness that will serve as both diagnosis for OE operations as well as a pre-and post measure. The accomplishment of Phase III will provide a broad look at the feasibility of development of instruments to accomplish Phase IV of the Evaluation Program.

6. BENEFITS TO PARTICIPATING UNIT:

The units which participated in Phase III stand to gain valuable information about their functioning and the relative usefulness of various indicators of mission effectiveness, both traditional and those newly developed during Phase III. Commanders will have more detailed knowledge as to what factors comprise their own subjective judgments and how to measure them. Most importantly, these units have been involved in research which can benefit the Army by providing a valid measurement of unit effectiveness which can be administered and interpreted by OESOs to assist commanders. OETC publicly expresses its thanks and appreciation for the invaluable assistance of all units and personnel who participated in obtaining the data for Phase III.

ISRAELIS VISIT OETC

In June Dr. and Mrs. Gavriel Salomon spent two days visiting with the staff, faculty and students at OETC. Dr. Salomon, who is a Major in the Israeli Army Reserves, is co-author of a paper entitled "Professional Dilemmas of the Psychologist in Organizational Emergency." This paper relates the authors' experiences in applying OD in a combat environment during the 1973 October War.

Dr. Salomon is currently on sabbatical from the University of Jerusalem and is working at Stanford University with the Department of Communications and Media and the Psychology Department as an associate professor.

During the October War Dr. Salomon actively participated as a psychologist dealing with emergency organizational development issues during battle. Previously he served in both paratroop and armor units. After the war he served for a year as a division-level consultant.

Mrs. Salomon is currently doing research at the Mental Research Institute in Palo Alto, CA as part of her PhD work in psychology. She is on leave from the Israeli Army where she is a full-time civilian in the organizational development program. She is also a Captain in the Israeli Reserves.

During their two day visit the Salomons conducted seminars with Class 3-78 and the staff and faculty. They also participated in a working conference with Concepts Development Directorate on the subject of OE in combat. Also participating were Dr. Otto Kahn, ARI liaison and CPT Dean Skaff of the 4th Infantry Division.

Audio tapes were made of the seminars conducted by the Solomons who have also presented seminars at DA and the Army War College. The tapes are available for loan through the OETC library.

Further information on the concept of OE in combat will be provided in up-coming issues of the Communique. Input from the field on this subject would certainly be welcome. Any input or questions may be addressed to MAJ Dick White, Concepts Development Directorate, OETC, Autovon 929-7106/7108.

ITEMS OF INTEREST

TRANSITION MEETING
A NEW BATTALION COMMAND SERGEANT MAJOR

CPT David A. Teichman

1. The Brigade OESO approached a One Station Unit Training (OSUT) battalion commander on the possibility of conducting a Transition Meeting involving his incoming Command Sergeant Major. The Battalion Commander an OE user, was very receptive to the idea and gave his total support pending concurrence by the new CSM. The new CSM was a member of the brigade staff so the OESO had no problem at all in arranging a briefing with the CSM to explain the purpose and objectives of the Transition Meeting. The new CSM was previously a 1SG in the same battalion and still knew several of the ranking NCOs and was somewhat familiar with battalion operations; however, he recognized the potential of the meeting and gave his approval and entire support.
 2. The OESO and CSM jointly determined that the participants would include: the CSM, four 1SGs, the PSNCO/PAC supervisor, S-3 NCOIC, and S-4 NCOIC/SAC supervisor. The contract included a 6 hour workshop to be held in a conference room at the NCO club. The objectives of the workshop were determined to be:
 - a. To get acquainted.
 - b. Clarify concerns, expectations, and priorities.
 - c. To examine the battalion's internal NCO management procedures and identify issues for improving overall effectiveness.
 3. The OESO made the arrangements for the workshop and assisted the CSM in publishing an advance sheet to all participants informing them of the meeting, its purpose, and the objectives. This correspondence also tasked them to be prepared to discuss their replies to the following questions reference their individual job concerns:
 - a. What are my priorities for the next 30 days?
 - b. What are my unit's/section's strengths and weaknesses?
 - c. What gets in my way of doing a better job?
 - d. What changes are needed to help me?
- The next set of questions dealt with the organization in general. They were as follows:
- a. What does this organization do best?

- b. What does this organization do worst?
- c. What programs/policies I would like to see changed.
- d. What programs/policies I want to see continued/not changed.
- e. The priorities in this organization as I see them are ____.

4. The meeting began at 1000 hours with the CSM voicing his support of the meeting and asking that all be open, honest, and candid with their remarks so that everyone would benefit. The OESO then gave all participants a brief explanation of the Transition Meeting and its purpose. Group objectives were published, group norms established, and the Agenda was presented. Next the OESO instructed all participants to secure a piece of butcher paper and record their replies to the first set of questions reference their individual job concerns and post on the wall. After this was accomplished the group broke early for lunch (1100 hrs) and ate as a group. The group returned to the workshop at 1200 hours.

5. After reassembling the OESO asked for a volunteer to be the first to present his replies to the CSM and the remainder of the group. All participants were reminded to reserve their comments and requests for clarification until the presentation was complete. The first presentation was slow and cautious but after the initial ice was broken the tempo picked up and exchanges of ideas and information began to flow freely. On several occasions the members got off on a tangent, removed themselves from the here and now, or attempted to problem solve. When this occurred the OESO stepped in, reminded them of the meeting objectives, and assisted the group in attaining their direction.

6. After all the participants concluded their presentations the group minus the CSM was divided into subgroups, one containing the 1SGs and the other composed of the staff NCOs. These two groups then answered the general questions pertaining to the organization and appointed a spokesman to present their group views to the other group and CSM. This proved to be very effective and surfaced several issues for meaningful discussion.

7. The workshop concluded on schedule with closing remarks by the CSM with his assurance to the group that the numerous issues that were uncovered would be shared with the battalion commander for consideration and/or action. The OESO then shared with the group his process observations on the workshop and their teamwork.

8. Conclusions/observations:

- a. Workshop objectives were accomplished.

b. The CSM was exposed to issues and concerns that he was not previously aware of.

c. The ISGs and PSNCO/PAC supervisor strengthened their understanding of each others' jobs and surfaced and remedied several dysfunctional issues between them.

d. Some personality conflicts surfaced which due to time constraints were not fully dealt with.

e. The time was sufficient to reach the objectives.

f. Additional workshops designed toward problem solving should be implemented because there were some outstanding ideas presented.

g. Based upon a previous workshop with this unit's officer personnel it was obvious to the OESO that both the officers and NCOs were tracking together on the same issues and concerns needed to make this good unit better.

9. Overall the Transition Meeting was successful because it did bring the new CSM on board in an effective and expeditious manner. It clarified a very important issue that sometimes surrounds the position of CSM - that issue is "What does a CSM do and what are his duties?" The question was answered clearly and precisely by the new CSM so that all the participants knew at workshop's end what he expected and intended to do as battalion CSM. It allowed him to experience the personalities of his top NCOs and hear from them first hand what they needed from him to better do their jobs. For many of the NCOs this was their first exposure to any type OE process and based upon solicited and unsolicited feedback they all left the meeting with positive feelings.

PLOWING VIRGIN GROUND
An Approach to getting OE off the Ground
In a Brigade-Sized Organization

CPT B. T. Mickley
OESO, 1st Sig Bde

One of my concerns as my class at OETC drew to a close was how I was going to approach my assignment as an OESO in a command which never experienced the OE process before. At the time, I felt as though OETC did little to help me with an approach to the problem but as a result of some help from my fellow OESOs and members of my organization a plan was developed and implemented. Recognizing that no one approach may work best for all, I offer the following as an example for others who may have or are now sharing my initial concern.

Upon arrival in the command, I was greeted with a great deal of support from the XO (my boss), the DCO and the Brigade Commander. During initial conversations, I was able to determine that the level of understanding and knowledge about OE was quite sophisticated within the immediate chain of command. During my interview with the Brigade Commander, I was given license to operate with a high degree of freedom and independence which I looked forward to with both enthusiasm and anxiety.

On the recommendation of my boss, I launched what was to be an initial two month education and information effort in the brigade.

Step 1, which was aimed at stating the Commander's belief in and support of the OE process and the brigade OESO, was accomplished through the use of a personal letter from the Commander to his battalion commanders and principal staff. A sanitized copy of the letter is included for reference and use as a guide. This letter was, in some cases, indorsed by the battalion commanders to subordinate company commanders, however, even in those instances where formal endorsement was not accomplished or made known to the brigade, the content of the letter was made known to potential users. The outcome of using such a vehicle appears to be totally favorable with no "pressure-to-participate" being felt by those who received the letter.

Step 2 was aimed at providing information in the form of formal and informal briefings to battalion commanders and their subordinate company commanders and staff concerning the OE process. The content of the briefing was limited to essential information on the OE process and was given at Battalion Commander's Conferences and Officer's Calls. A briefing was also conducted for the Brigade Commander and his principal staff which assisted in building a support base in the immediate

headquarters. Future information briefings will be conducted as key personnel rotate into the brigade.

Step 3 was aimed at providing information concerning the OE process to "the masses" and was accomplished through the publication of an article in the brigade's monthly newspaper. According to the Brigade Public Affairs NCO, the primary readership of the newspaper is O-3 and below which would include the audience not completely covered by the initial letter or information briefings.

Step 4 is an ongoing process and will include the publication of OE Information Papers on various topics concerning the OE process. Initial topics have included the Leadership and Management Development Course and the Transition Meeting. Information Papers are forwarded down to and including company level. In addition, articles will be published on a monthly basis in the brigade's newspaper in an "OE Column." The intent of these articles is to provide more information to the readership on OE applications and innovations with a shift in focus from pure theory to "war stories" on OE processes in the brigade. Clients are encouraged to draft articles with the assistance of Brigade Public Affairs personnel for publication. Willingness to participate has been favorable. This will ensure recognition for client participation and will, hopefully, build a further support base for OE in the brigade.

All in all, the approach described herein has been highly successful to date. It has evolved out of the suggestions and assistance of many and will hopefully be of assistance to other OESOs in the field.

SAMPLE LETTER

Effective this date, CPT Brian T. Mickley has been assigned as the Brigade Organizational Effectiveness Staff Officer (OESO).

As you may already know, Organizational Effectiveness is not a "new program" but is rather a process which represents the military application of the most current management and behavioral science technologies. It is systematic and oriented toward leadership and management techniques that result in people being more involved, motivated, committed, and effective both individually and collectively in the accomplishment of a unit's mission.

With this brief philosophical overview, I wish to extend my wholehearted support to both the Organizational Effectiveness process and to CPT Mickley as the Brigade OESO. I do not intend to impose CPT Mickley upon you, however, his services are available to you upon request. I also want to assure you that by requesting and utilizing his services you are not implying a "need for help" but rather a desire for increased effectiveness.

CPT Mickley will be contacting you in the very near future to make an appointment to brief you and your staff about the Organizational Effectiveness process. If you have any questions prior to that time, please feel free to contact him at 6593/6411/6632.

SAMPLE LETTER

"BOTTOM UP TRANSITION"

CPT Robert S. Lay
CPT Patrick N. Carroll
HQ, 5th Inf Division

Almost every transition model involves the upper levels of the chain of command. As such, the new commander may get a one sided view of his new organization and it may require even more time in coming to grips with the "entire" battalion. What we present here is not a new approach, but an old and simple one--getting information from the "bottom-up".

The organization is a combat service support battalion co-located with another battalion on a small cramped kaserne in USAREUR. The battalion is small in comparison with others having about 400 soldiers assigned. Of the 400 soldiers, there are about 250 caucasians and 150 minority soldiers; also about 20% of the soldiers are females. The incoming battalion commander knew he would be facing some "unique" situations and what follows is his initial attempt to identify some of the situations and at the same time become acquainted with his new battalion.

A couple of weeks prior to his assumption of command, we discussed goals, objectives and design. Together we agreed upon six different groups to participate: E1-E4s; minorities, females, E5-E6s, E7-E8s, officers. Each group was to consist of about 15-20 individuals and each group session would last for 2 - 2½ hours. We decided on the following design:

GOAL

To gain an early insight into the battalion through discussions with personnel within the battalion.

OBJECTIVES

To provide the commander with the opportunity to meet a cross section of the battalion.

To allow participants to voice what they see as the strengths and weaknesses of the battalion.

To use the information acquired as a base for formulating objectives leading to improved mission performance and quality of life within the battalion.

METHODS

| | |
|-----------|---|
| 5-10 min | Bn commander personally meets each participant |
| 5-10 min | Opening remarks by battalion commander <ul style="list-style-type: none">-Goals and objectives-Why this approach-His part in the discussion-Introduction of OESOs |
| 5 min | OESO Administrative Instructions <ul style="list-style-type: none">-Agenda-OESO training-Confidentiality-Need to be open and honest-Need to be constructive |
| 30 min | Brainstorm <ul style="list-style-type: none">-What it is and how it is done-What do you see going right in the battalion?-What do you see going wrong in the battalion? |
| 10 min | Break |
| 50-60 min | Discussion <ul style="list-style-type: none">-Clarify, consolidate, and discuss items raised during brainstorming |
| 5 min | Prioritize Items - Poll Participants |
| 5 min | Group Consensus <ul style="list-style-type: none">-Introduction by OESO (turn to butcher paper page with "If I were the battalion commander for a day, and could change one thing, I would" and instruct group to decide) OESOs and battalion commander sit back and observe. |
| 5-10 min | Closing by Commander |

We arrived about 1 1/2 hours before the initial session to review the design with the battalion commander who had now been in command for less than a day. He was eager but apprehensive; especially about his role in the group session. We reviewed his role and reminded him that

he could enter into the conversation as he desired or he could just sit back and listen. If we saw him getting "hooked" or "backed into a corner", we would mediate the conversation attempting to maintain the group's energy and momentum. The first session started well and as usual we received more negative comments than positive ones. After the brainstorming we took a break. One of us stayed with the group and the other went to the battalion commander's office to get his initial reactions. We realized that we had not adequately prepared him to accept this much negative information and he was beginning to wonder if there were "any" positive things going on in his battalion. We tried to explain that the group energy would soon turn positive; however, he didn't appear convinced when we started again. As we entered into the discussion stage, the prioritization, and group exercise, we could see the energy growing more and more positive. We concluded that first session after about three hours and went in to discuss our observations with the commander. He was charged up, ready to make changes now, and it was readily apparent that the positive energy displayed in the conference room was very contagious. We had to calm him down, bring him back to reality, and stop him from changing everything before he had a chance to "listen in" on some other groups. Having convinced him we returned to our office, reduced the butcher paper comments to typewritten ones and added our personal observations concerning the group. We returned the next day with these typewritten comments, gave them to the commander and then conducted the same type sessions with five other groups during the next week.

As we met with each group, we gained a new and different insight into the battalion. Upon conclusion of the last session the battalion commander was convinced that he was able to learn more about his battalion in that first week than some battalion commanders will ever know about their battalions. It was our observation that this was especially true concerning female and minority soldier perceptions and how his troops perceived their chain of command to function.

A logical follow on to this type of transition would be to include the commander, his staff and commanders in somewhat of a more typical transition with some goal and priority setting. The new commander has a much broader knowledge base about his battalion and is now in a more informed, powerful position to make decisions and to enter into those discussions about the roles and perceptions of the staff and commanders.

This type of a transition has a very positive effect on the entire battalion. The commander is exposed to his soldiers early on in his command but more important he is exposed to their perceptions and the soldiers are exposed to their new commander in a positive setting. They see him willing to listen to what they have perceived as problems

throughout their tenure in the battalion. The staff and commanders are positive about the transition because they are allowed to give in-depth discussion about many of the same problems and offer solutions that they might not have been able to offer in the past.

Transition from the "bottom-up" provides the new commander with a multisided view of his "entire" battalion, not just a part of it.

MILITARY AWARDS ASSESSMENT

MAJ Ron Walter
USACC

Our OE/MBO Office was asked by the Chief of Staff to assess efficiency and effectiveness of the USACC military awards system. The Chief was particularly concerned with perceptions of policies and guidance, fairness of the existing system, and adequacy of feedback provided to members of our Military Awards Board. He directed us to confine our information gathering efforts to our own headquarters and to those of subordinate units located here at Fort Huachuca.

We decided to study policy directives, develop a flow chart to describe internal operating procedures, review files of processed awards, create statistical arrays to display processing trends, and then develop an overall approach to analysis. The statistical arrays suggested several hypotheses concerning numbers and levels of awards, and our flow chart revealed several "black boxes" related to the decision-making process. We couldn't determine how decisions were made by either board members or members of our command group. Further, we had no feel for the impact of subordinate unit activities on our internal operating efficiency. To fill these voids, we decided to conduct individual interviews with all three groups. Our interview guide (inclosed) was intentionally open-ended.

To answer perceptual questions, we developed the Military Awards Questionnaire (inclosed). The questionnaire was designed to run on the OE Survey Data Processing System and to provide output which would allow for comparison of perceptions across several groups. We planned to form groups of command group members (question #3), awards processors (#4), board members/nonmembers (#5) and awards initiators/noninitiators (#7). Demographic questions were included which would also allow for analysis by grade (#1) or by number of awards evaluated (#6). Finally, a unit code was included to allow for individual feedback to subordinate commands participating in the assesment effort.

Use of the open-ended question (Part C) proved particularly useful. Comments from this portion of the instrument were factor analyzed by respondent group, providing a measure of intensity of concern to accompany the degree of agreement/disagreement measured in Part B.

Question 3 created some problems. Histograms of demographics revealed many more members of "command groups" than were appropriate. Our assumption was that many respondents assigned to headquarters elements believed themselves to be members of the "command group." Because of the obvious errors in data collection, we based our analysis of command group perceptions on interview data only.

Feedback to the Chief was provided in an informal briefing. We summarized DA guidance, our own policies and procedures, relevant statistics, results of the factor analysis of Part C responses, and various perceptions relating to the Chief's specific concerns. We provided a detailed written report and concluded our briefing by outlining possible decision areas and some alternative methods of making decisions around those areas.

The Chief decided to assemble a group composed of himself, the Commanding General, the Deputy Commanding General, and representatives from the Personnel and Public Affairs Directorates. He asked us to provide the same informal briefing to that group so it could act in a problem identification/solution capacity. In approximately one hour, the group absorbed and discussed the data, identified areas of concern and made appropriate decisions relative to each area. At the conclusion of the meeting, the Chief summarized decisions approved by the Commander and tasked appropriate staff heads with implementation of those decisions. Our task is to conduct a follow-up evaluation in December which will essentially replicate the original assessment.

Interview Guide

- (1) (a) Tell me about your role in the Army Communications Command (ACC) military awards system?
 - (b) How do you interface with other parts of the system?
 - (c) Who, specifically, do you interact with?
- (2) (a) What do you see as the main objective of the system?
 - (b) How well do you see this headquarters meeting that objective?
- (3) (a) What guidance has been established with respect to military awards in ACC?
 - (b) How adequate do you believe it to be?
 - (c) How well understood is that guidance?
- (4) What do you see as the strong points of the present system?
- (5) What is the one thing you would like to change in the present system?
- (6) (a) Tell me about the Military Awards Board.
 - (b) What do you see as its main function?
 - (c) How effective is the board?
 - (d) How efficient is it?

- (7) What about the role of the Command Group?
- (8) Do you have any comments about the PAB role?
- (9) Is there anything else you'd like to talk about?

MILITARY AWARDS QUESTIONNAIRE

PRIVACY ACT STATEMENT

The major purpose of this questionnaire is to gather information about the attitudes, opinions, and impressions of various individuals concerning the USACC military awards system.

Your individual responses will be transferred to computer cards and/or combined with those of many other people and summarized in statistical form. A report showing the average response to each item will be prepared for the Assistant Chief of Staff for Personnel and Administration, USACC, or for any others selected at his discretion. This report may include information about groups selected on the basis of background information such as unit or grade of respondents. Care will be taken so that no information will be provided that would allow any single individual to be identified by persons reading the report. The information will be retained until appropriate policy decisions have been implemented.

Compliance is voluntary. There is no effect on the individual for failure to disclose information. However, you are requested to answer all statements unless you have an extreme reluctance to do so; your answers will contribute to a more accurate assessment of the Command's military awards system. Please return all sheets of this questionnaire.

Thank you very much for your cooperation in completing this questionnaire.

AUTHORITY: Title 19, United States Code, Section 3012

PRESCRIBING DIRECTIVE: AR 600-46

MILITARY AWARDS QUESTIONNAIRE

INSTRUCTIONS:

This questionnaire is intended to gather information about attitudes, opinions, and impressions of various individuals concerning the USACC Military Awards System. Read each statement carefully and mark your response on the answer sheet provided.

PART A: BACKGROUND INFORMATION

Circle the numbered response on your answer sheet which most nearly identifies your status in each of the categories listed.

(1) Pay Grade/Classification

- 1 - E1 - E4
- 2 - E5 - E6
- 3 - E7 - E9
- 4 - W1 - W4
- 5 - O1 - O3
- 6 - O4 - O5
- 7 - O6 - O8
- 8 - GS
- 9 - WG
- 10 - Others

(2) Unit

- 1 - HQ USACC
- 2 - HQFH
- 3 - 11th Sig Gp
- 4 - Others

- (3) I am presently assigned to the HQ USACC Command Group.
- 1 - Yes
 - 2 - No
- (5) I have served as a member of a Military Awards Board during the past year.
- 1 - Yes
 - 2 - No
- (6) As a member of a Military Awards Board, I reviewed approximately the following number of awards during the past year.
- 1 - I have not served as a member of a Military Awards Board during the past year.
 - 2 - Less than ten.
 - 3 - At least ten but less than twenty-five.
 - 4 - At least twenty-five but less than fifty.
 - 5 - At least fifty but less than one hundred.
 - 6 - At least one hundred.
- (7) I have recommended at least one military member for an award within the past twelve months.
- 1 - Yes
 - 2 - No

PART B: AWARDS SYSTEM QUESTIONS

Indicate your reaction to each statement by circling the numbered response on your answer sheet in accordance with the following scale:

| | | | | |
|----------------------|----------|----------|----------|-------------------|
| <u>1</u> | <u>2</u> | <u>3</u> | <u>4</u> | <u>5</u> |
| STRONGLY DISAGREE | DISAGREE | NEUTRAL | AGREE | STRONGLY AGREE |

- (8) Military awards should provide tangible recognition for acts.
- (9) Military decorations should be used primarily to recognize acts performed during wartime.
- (10) I am familiar with this unit's Command guidance on military awards.
- (11) This unit's Command guidance on military awards is adequate.
- (12) This unit adheres to Command guidance on military awards.
- (13) The number of military awards submitted for personnel in this unit is adequate.
- (14) The number of military awards approved for personnel in this unit is adequate.
- (15) Military awards are processed in a timely manner in this unit.
- (16) Military awards are processed in a timely manner by higher headquarters.
- (17) Awards recommendations are fairly evaluated in this unit.
- (18) Awards recommendations are fairly evaluated by higher headquarters.
- (19) Appropriate levels of awards are given to personnel of my grade/classification.
- (20) The frequency of awards given to personnel of my grade/classification is appropriate.
- (21) Awards presentation ceremonies in this unit are appropriate.
- (22) Military Awards Boards serve a useful function.

- (23) Military Awards Board recommendations are usually followed by the Commander.
- (24) This unit's Military Awards Board is fair in its evaluations.
- (26) This unit's Military Awards Board generally recommends approval of awards as written.
- (27) Recommendations for awards in this unit are prepared in a timely manner.
- (28) Recommendations for awards in this unit are well prepared.
- (29) Recommendations for military awards are rarely recommended for downgrade by members of this unit's Military Awards Board.
- (30) Individual members of this unit's Military Awards Board are consistent in their evaluations.
- (31) Military Awards Board members make their evaluations based solely on information contained in recommendations packets.
- (32) Individual members of this unit's Military Awards Board are provided adequate feedback on their recommendations.
- (33) My commander is fair in his evaluations of military awards.
- (34) My commander is consistent in his evaluations of military awards.
- (35) My commander rarely downgrades recommendations for military awards.
- (36) This unit's military awards system is effective in accomplishing its objectives.
- (37) This unit's military awards system is efficient in accomplishing its objectives.
- (38) All in all, I am satisfied with this unit's military awards system.

PART C: COMMANDER'S INFORMATION

Use the space provided on your answer sheet to respond to the following question:

What is the one thing you would like to tell your commander about the military awards system?

NOTE: For economy purposes the answer sheets were not included. A separate answer sheet was provided in the respondents' booklet for sections A, B and C. Section A and B answer sheets contained the question number and the numbers for each possible response. Section C answer sheet provided space for an essay-type response. EDITOR.

FEEDBACK FORUM

LTC Charles O. Neal

Feedback on OE efforts conducted in a large headquarters support command of which 68% are civilian employees, many of whom are managers.

CASE I: One organization had a tremendous backlog -- nearly six months -- was using a lot of overtime and not really reducing the backlog. After OE intervention, seminar, group sensing and a team building session, backlog two months later is down to less than four months and overtime has been reduced by two thirds.

I see this as measuring a real increase in productivity. Incidentally, this was done with no loss in quality control. (Actually measured).

CASE II: Technical military unit involved in inspection and training mission with high travel requirements. Most work done away from location of unit. Before OE, excess use of travel funds. Barely able to accomplish basic mission -- just marginal. Quality of inspection reports and training poor. High turnover in organization -- everyone trying to get reassigned one way or the other. Three months after OE intervention, seminar, team building; 20% decrease in travel funds used due to better planning and organization of requirements. Training rated superior. Quality of inspection reports increased greatly. (Subjective analysis by higher command level). Retype requirements decreased over 80%. (Large item--reports are voluminous).

Climate in organization such that trained technicians (scarce assets) are trying to stay with organization instead of trying to leave. Overtime decreased by 50%. People working harder but liking it more. Equipment deadline rate cut in half.

CASE III: Large directorate of support organization. Results of organization effectiveness efforts -- deadline rate in two large motor pools went from 15% to 3% in four months. Directly attributable to organization effectiveness effort which recommended structural -- management control change. Sick call for drivers reduced. Rate of fill for transportation requests increased. Invalid fill of transportation requests decreased drastically. Instances of extra transportation dispatched when not needed reduced almost entirely. (There were cases of five buses or trucks being dispatched when only three or four were needed -- each manager safe siding instead of accurately determining requirements). Instance of transportation dispatched to wrong place or time reduced by half. Level of driver maintenance increased dramatically.

We have run over 30 interventions. All have had positive results of some kind -- some results are fairly measurable as the three cases I've cited. Others, the results were more subjectively measured but nevertheless there. There have been several cases of valuable, trained employees opting to remain in the organization after OE interventions when they had already made a decision to leave. Training of people to fill the jobs would have been costly.

The results of OE, I think, are really impressive. Particularly when one takes a long-range look at the effects on the organization and the people in it. As I see it, probably the most significant result is that of teaching the organizations how to surface their own problems and deal with them effectively before they become major issues and dysfunctional to the organizations' effectiveness. I see no way other than subjectively to measure this result by my opinion is the effects of this will be more powerful in the long run than anything else.

OD 78

A conference on current theory and practice in organizational development was held recently in San Francisco, CA. The conference, sponsored by University Associates, was attended by several OETC staff members as well as OE personnel from DA and several TRADOC and FORSCOM OESOs.

The agenda for the conference consisted of eighteen presentations made by some of the more widely-known professionals in the field of OD. A copy of each presenter's paper was given to the attendees. These papers are on hand in the OETC library and are available to you under our loan policy. A complete list of the presenters and their topics is included in the Sources and Resources section of this issue of the Communiqué. What follows in this section is a sampling, in synopsis-form, of some of the papers that were presented.

OD 78 FEEDBACK

** TITLE/AUTHOR - Organizational Climate: Proven Tool for Improving Performance. Litwin, G. and Humphrey, J.

SUMMARY - Organizational Climate is a system that includes: (1) perceptions and expectations of employees (climate); (2) determinants (management practices, organizational systems, employee norms and values); and (3) consequences (organizational health, growth and performance; individual health and satisfaction). The Climate Management Process is introduced as a tool to help managers utilize knowledge of the climate system to improve performance in their areas of responsibility.

KEY POINTS - Climate is a way of measuring people's perceptions of what it is like to work in a given environment.

A fourth generation climate questionnaire, refined from Litwin and Stringer (1967, 1968) measures: clarity, commitment, standards, responsibility, recognition, teamwork. National norms have been developed against which responses can be compared resulting in a climate profile. Organization Climate scores are used as feedback devices to help managers identify and improve conditions necessary for sustained top performance.

Effects of climate on health and short-term performance, as well as motivational factors are shown. The Climate Management Process includes (1) size-up, (2) action plan, involvement and (4) results.

APPLICATIONS -

-- OETC: Understanding the role of climate to Organizational Effectiveness together with an operational definition of the terms and the resultant measurement technique communicated by Litwin and Humphrey.

-- ARMY OE: The Organizational Climate System provides a unit commander with hard data on organizational conditions and his or her own management practices, comparing his or her unit with national norms.

PREPARED BY - Otto Kahn

** TITLE/AUTHOR - OD Readiness. Pfeiffer, B. and Jones, J.

SUMMARY - Planned change is likely to be effective regardless of the methodology applied, if certain prerequisites are extant in an organizational system. Conversely, the most sophisticated techniques employed by the most competent consultant will fail if the organization is unready to undertake a project of planned change. Pfeiffer and Jones identify

fifteen indicators in three broad areas that can be used to evaluate the readiness of an organization to undergo an OD intervention; each indicator is weighted according to the degree that it is critical to the OD effort. The conclusion is that if the organization cannot be meaningfully affected by OD technology, the consultant should utilize other strategies.

KEY POINTS - The four OD entry strategies: working from the top down, crisis intervention, dealing with successful groups and training each has advantages and disadvantages.

Franklin (1976) found that organizations that are oriented toward and committed to planned change are more amenable to OD interventions from internal change agents who are not preconditioned towards ready made answers.

An instrument made up of fifteen indicators in three broad areas (general considerations, resources and people variable) are used as the basis of the OD Readiness Check List. Each indicator is weighted according to its relative criticalness. The instrument may be used as the basis for a subjective assessment of an organization to determine the degree to which that organization is likely to support an OD effort.

APPLICATIONS -

-- OETC: Measurement of organization's readiness for OD is a potential subject for teaching OESOs to carry out the scouting phase of an operation.

-- ARMY OE: The instrument could be used by the Army to assess a unit's readiness for an OE operation.

PREPARED BY - Otto Kahn

** TITLE/AUTHOR - Improving Stress Management. Adams, J.

SUMMARY - The author discusses his and other research findings, and integrates this research on stress management by developing a model associating stress management with organization development. He provides recommendations for improving organization conditions, as well as personal responsibility for action in reducing stress.

KEY POINTS - Four types of sources of stress are identified. Two types are job connected and two types are identified with conditions and events away from work.

Stressors which apparently have the most pervasive impact on respondents are by and large informal norms rather than specific organizational change events.

Stress levels are correlated at significant levels with: level of strain, number of health conditions, felt satisfaction and growth, felt effectiveness.

Most respondents had poor exercise habits; many had poor dietary habits. Good exercise and dietary habits were associated with low numbers of reported health conditions.

APPLICATIONS -

-- OETC: The need for including stress management as an integral part of the program of instruction is emphasized.

-- ARMY OE: A stress program should be managed with the required resources and the amount of time required to make complex changes in personal and organization habits.

PREPARED BY - Otto Kahn

** TITLE/AUTHOR - "Managing the Tension between OD Principles and Political Dynamics," by Robert T. Golembiewski, PhD.

SUMMARY - This paper addresses the opportunities that exist for the practice of OD in systems that are characterized as having strong political and administrative orientations. Golembiewski discussed the vast complexity of working at the interface between these two factions and the ethical and professional questions that confront the consultant as he/she attempts to span the boundaries established by both sides in an effort to achieve results that have a positive effect on the system as a whole. He offers direction and counsel in the form of nineteen guidelines derived from his own experience in working with the interface between politics and administration. Although speaking primarily from a perspective gained from working in Public Administration, Golembiewski offers his principles as useful to all who consider themselves to some degree as an "interstitial player."

KEY POINTS - The interface is generally recognized as the gap created by the difference between the professionals (who value specialized knowledge, science and rationality) and the politicals (who value negotiation, empire-building and developing power bases).

The "politicals" generally complain about an unresponsive bureaucracy and the "professionals" about transient fads and personalities.

The divergent methods of setting goals and measuring performance in highly political organizations are usually at odds with OD values and usually preclude the use of traditional intervention models. Different approaches, often in conflict with OD values, may be required for effective implementation of change strategies.

Value differences between the client system and the consultant must be recognized by the consultant. While they should not be forced on the system, the system should be made clearly aware of the perspective from which the consultant operates.

Intervening to provide short term relief from organizational stresses, while useful, runs the risk of promoting long term dependency. Interventions designed to prevent future problems and develop the system may run counter to the perspectives of many in the organization. Personal risk-taking on the part of the consultant seems more necessary here than in less volatile environments. However, this raises the issue of the consultants' survival which attaches to the much larger issue of "who's needs are being met."

APPLICATIONS -

-- OETC: Injecting instruction on the political aspects of organizations would greatly broaden the perspective of the future OESO. The student needs to be better prepared to deal with political issues which are often major considerations in organizations.

-- ARMY OE: Recognition of the existence of this territory called the "interface" is necessary if OE is to make inroads in the long-standing problems experienced between the tenured civil servant and the "here-today-gone-tomorrow" military supervisor. This situation is analagous to the political/administration environment that characterized Public Administration. It would appear that this area requires large system interventions as opposed to the small group interventions that have so far characterized the practice of OE in the Army.

PREPARED BY - MAJ Paul J. Rock

** TITLE/AUTHOR - "Improving Organizational Effectiveness Through Focus Upon Environmental Quality," by Jack R. Gibb, PhD.

SUMMARY - This presentation contrasted an environmental-design concept of consulting with the more traditional intervention models. The design is based on an Environmental Quality Scale (EQ) correlated with the evaluation of trust level in cultures, organizations, groups, and persons. The scale is derived from the Trust Level (TORI) theory and traces evolution through punitive, autocratic, benevolent, advisory, participative, emergent, organic, holistic, transcendent, and cosmic states. The concept was presented as a framework for diagnosing organizations. Gibb contends that this design has application to any organizational setting.

KEY POINTS - This concept establishes the Trust Level as the key variable in all human systems, making it the central issue in OE operations. The quality of the environment (trust level) is directly related to significant outcome measures of organizational effectiveness.

To have a lasting effect an OE effort must be based upon the EQ level toward which the system is moving rather than from which it's moving, e.g., trying to resolve power, authority or status issues at the EQ11 (AUTOCRATIC) level would probably be irrelevant if the system needs help to resolve an impasse at the EQ111 (BENEVOLENT) level.

Recognizing the new needs at each level up the scale helps the consultant to avoid inappropriate interventions that might stunt growth and development.

A consultant is probably most effective if his or her internal environment level is within two levels of the client system's thereby allowing the consultant to share an expanded perspective because of familiarity with a wider range of environments.

Persons or human systems produce more effective movement up the evolutionary scale of trust through internal environmental design rather than through external intervention. The environmental design approach assumes that persons or institutions can determine their own environment and solve their own problems. On the other hand, the external - intervention (consultant) approach is essentially a low-trust viewpoint based upon several assumptions that involve low trust in the person or system that is the client. To be effective, the consultant must join a system at its environment and look with that system with a view toward looking for changes that lead toward improved performance rather than work to do something to it.

APPLICATIONS -

-- OETC: Integrating this environmental design into instruction on ASSESSMENT would help to clarify the often elusive concept of climate. It would also help impress upon the student that organizational climate is not static but a dynamic phenomenon that he/she must stay tuned into if the action plan is to be relevant. Placing a greater emphasis on trust will help the student to avoid the frustration of establishing expectations that are not met because the organization "did not do what was best for it" as "prescribed" by the OESO.

-- ARMY OE: Developing an authentic belief that commanders will ultimately do what is best for their organizations will help OESOs to maintain their focus on the needs of the organization and less on their own. OE must continue to grow in its sophistication if it is to become truly pervasive in its application. Part of this sophistication must be an increasing ability to determine the environmental state or "place" wherein the organization resides if OE activities are to have any relevance to the needs of the organization.

PREPARED BY - MAJ Paul Rock

** TITLE/AUTHOR - "Trans Concept Development (TCD): An Introduction," by Stanley M. Herman.

SUMMARY - TCD consists of a model and an accompanying methodology aimed at awakening and further developing human capacities beyond those of the intellect -- areas that have recently come to be identified as "expanded states of awareness." Herman believes TCD appropriate matter for the OD consultant because it: (1) provides a theoretical framework for the processes of personal growth and change and (2) is useful in developing and improving practical consulting and managing skills. TCD is an extension of Authentic Management and Gestalt theory and practices.

KEY POINTS - TCD is described as an idiom or "just a way of talking." The experience of TCD transcends the words used to describe it. Therefore, the concepts are not presented as necessarily true or untrue but rather as a point of departure for further investigation.

TCD as a model of human experience parallels other models of human development, e.g. Maslow.

The goal of TCD is to develop the capacity to go beyond the limits of what we currently accept as reality to discover new "truths" and new "realities."

APPLICATIONS -

-- OETC: TCD has no particular relevance to OE either as part of the OE course of instruction or its implementation in the field. It may, however, have significant relevance to those individuals who are pursuing the development of their non-cognitive capabilities as part of their personal growth program.

PREPARED BY - MAJ Paul Rock

COMMUNIQUE TEAR OUT SHEETS

"Make it pragmatic. It must contain information--workshops--ideas--articles that OESOs can use to make OE work in the Army. That's the mission of the COMMUNIQUE."

These were the directions given to the editor of the first issue of the COMMUNIQUE by the Commander, OETC. And to this end, countless people have worked long hours.

However, to meet the needs of OESOs, we must know what you want--what you need--what would be most helpful--what you have learned. So, we have included OESO tear out sheets. There are three tear out sheets, each addressing a different topic.

The first tear out sheet addresses a simple but critical topic. What can we at OETC do to support your OE efforts? What kind of help do you want from us? How can we assist you? The second tear out sheet is one which provides an opportunity for you to discuss your OE efforts with other OESOs. It provides an opportunity for you to share innovative ideas--new workshops--new study projects--programs, whatever is working (when working) for you. The third tear out sheet is to talk about "lessons learned." A great body of knowledge about different types of interventions resides with OESOs. OESOs can profit from the lessons learned from those interventions as the information is presented to them through the COMMUNIQUE.

Why not spend some time right now and provide us with some much needed information which will be edited and included in the next issue of the COMMUNIQUE.

SUBJECT: OETC OESO Assistance

Editor
OE Communique
P. O. Box 40
Fort Ord, CA 93941

Tear out #1

SUBJECT: OE/OESO Efforts Updated

Editor
OE Communique
P. O. Box 40
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Tear out #2

SUBJECT: OE Lessons Learned

Editor
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Tear out #3

ARTICLES OF INTEREST

AN OE FLOW CHART: A PATH FROM BEGINNING TO END

LTC W. R. Gamble

It is often difficult for a client to visualize, conceptually, the flow of an OE effort in his organization from beginning to end. The difficulty stems primarily from the long-term, intangible nature of OE itself, as opposed to the short-run, bottom-line-results orientation of many managers. The difficulty is further amplified in light of the variety of approaches or interventions available to a client system and the infinite number of possible outcomes resulting from a particular course of action. The use of a simple model, depicting the major portions of an OE effort is useful in providing an overall view of what happens and when. The model is constructed, using a modified ADP systems flow chart format. It can be expanded to explore a particular process, decision, or outcome in as much detail as may be required for clarity or understanding.

MAJOR ASPECTS OF THE OE MODEL

The major segments or phases of the OE effort portrayed by the model include: collection, analysis, and feedback of organizational assessment data; the planning for and design of specific intervention strategies, methods, and activities; and evaluation of the impact of intervention on the client system. In explaining the model, it is helpful to identify specific consultant/management tasks and responsibilities as the different phases or processes unfold.

DIAGNOSIS OF THE ORGANIZATION

Figure 1 outlines the first steps of the effort, beginning after successful completion of a contract for OE. It is recognized that arriving at a suitable contract may, in itself, be quite a complicated process and the model can be modified to include this aspect if desired; however, contracting is not addressed here. When outlining the diagnostic process, it may be necessary to indicate (perhaps as a subroutine) the specific decisions required by management and the effects of those decisions; for example, management's own assessment of and insight into the organization's climate will impact on the selection of techniques and procedures for further diagnosis. In addition, management's desires, in terms of specific data elements to be measured, will narrow the focus and affect the structure of any instrument developed for assessment purposes.

To illustrate, if it is determined that the intervention was aimed at the wrong target level in the organization, this fact should be pursued in additional planning sessions and a more appropriate target group selected. If, however, the target was right but the selected

problem area appears questionable, original assessment data should be reevaluated, even to the point of conducting further diagnosis to identify a more workable issue or to isolate and concentrate on the original area to a greater degree. Finally, the strategy selected may have been inappropriate for the people and issues involved; therefore, a new look at strategy is called for.

Throughout the entire process, there should be some systematic efforts to integrate OE philosophies and techniques into the client system's social and normative structure to prevent reversal of positive trends and to insure further growth of the organization. The organization should be left with sufficient expertise to be able to examine its current state of internal affairs, and to apply OE where necessary. If this capability is cultivated and established within the organization, the formal OE emphasis can be terminated and the consultant remain on call for assistance should the need arise.

Figure 5 addresses the OE process in its entirety. The numbers used merely represent reentries into the model at corresponding points; i.e., a negative response to approval of action plans directs you to ② (plan with management on ways to improve); a negative response to appropriate target level directs you to ④ (select strategy and target level).

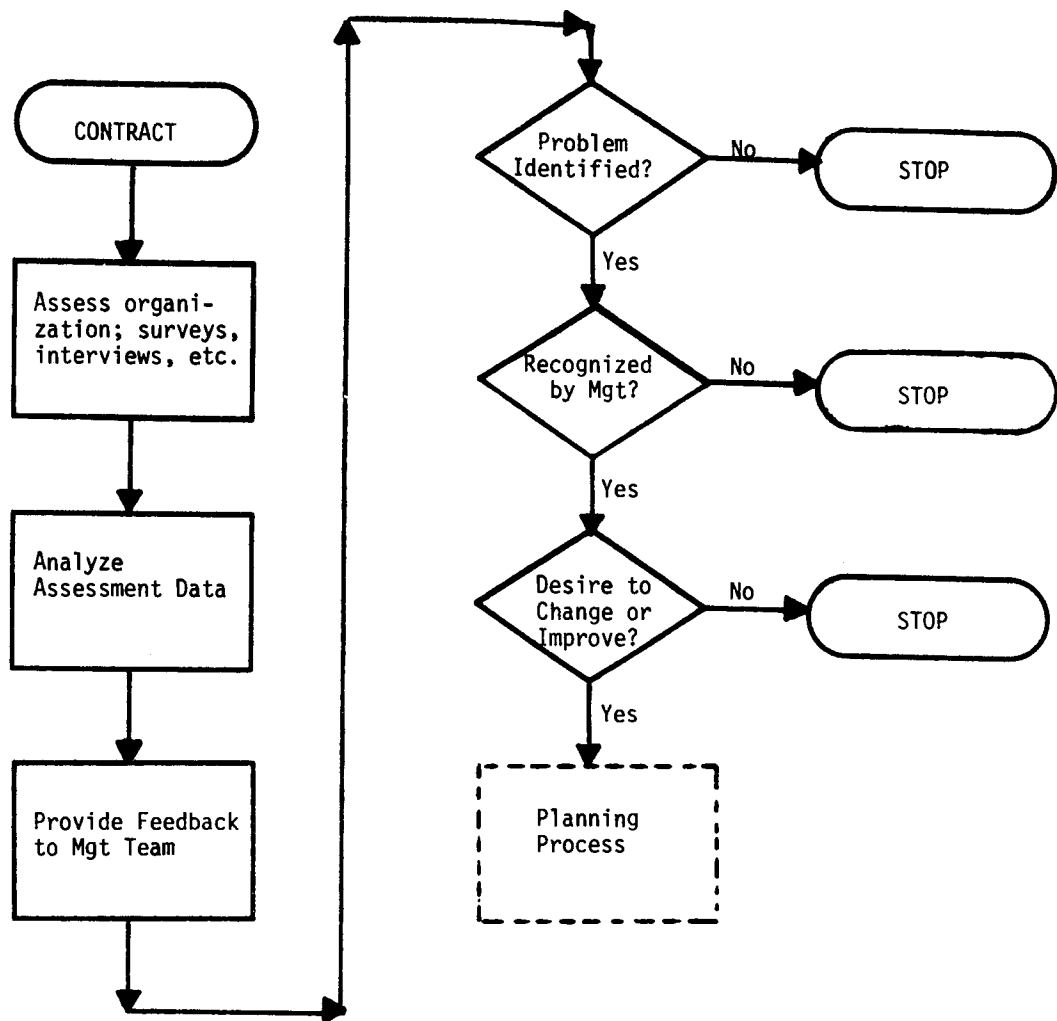


Figure 1. Assessment Process

As the decision points in Figure 1 illustrate, if a need for further action is not revealed, recognized, or desired by management as a result of the assessment, there is little need to go on without some renegotiation of one or more aspects of the contract. It may be necessary to re-design assessment tools; it may also be desirable to terminate the effort entirely. However, if these critical decisions are responded to positively, the effort can proceed to the next phase, planning and designing interventions.

PLANNING AND DESIGNING INTERVENTIONS.

The next step in the flow of the OE effort is depicted in Figure 2. To be most effective, management's involvement in the planning and design phase should be extensive. Through involvement, management assures that interventions selected will be more realistic and fine-tuned to meet the unique needs

of their organization. Further, they (management) will develop a sense of ownership for the effort and should more readily commit time, energy, and other resources necessary for successful implementation of their plan; failure isn't a viable option when the stakes are high enough.

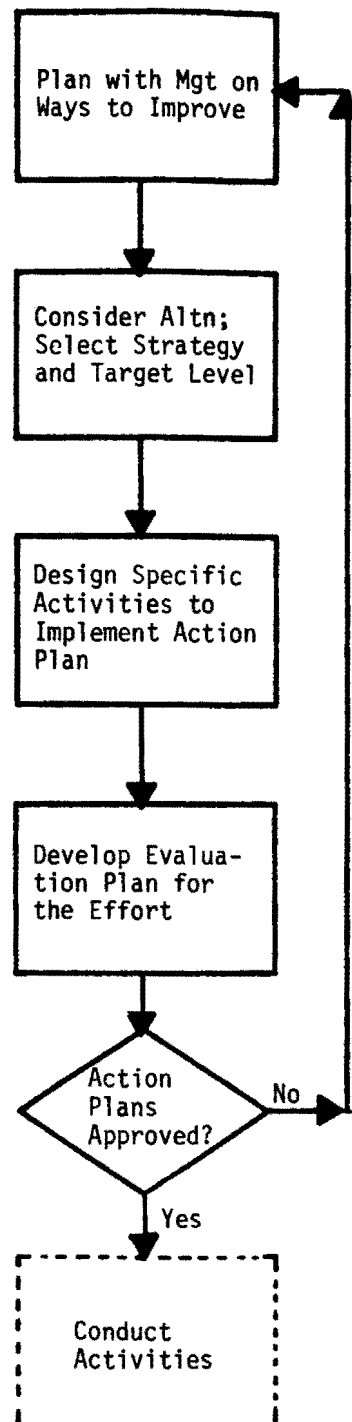


Figure 2. Planning Process

It should be noted that early in the planning stage, attention is focused not only on the short-term aspects of OE, i.e., entry level and activity design, but on the development of a sound evaluation plan by which to measure the results of the effort in the long-run. It may be desirable, depending on the organization and its individual resources, to develop the evaluation plan even as part of the contract itself. For ease of modeling, however, this task fits well and is included in the planning stage.

CARRYING OUT THE PLAN.

Implementing the overall plan of action developed in the proceeding phase is the next step. While there must be considerable technical flexibility and freedom of action for the consultant, management approval should be sought if major changes are required to the overall direction of the action plan or if the situation dictates radical departure from originally agreed-upon intervention strategy. A critical aspect of this phase is the mid-course evaluation. It is a built-in, systematic review of progress to determine if original objectives are being met and whether or not adjustments are needed. This procedure is shown in Figure 3.

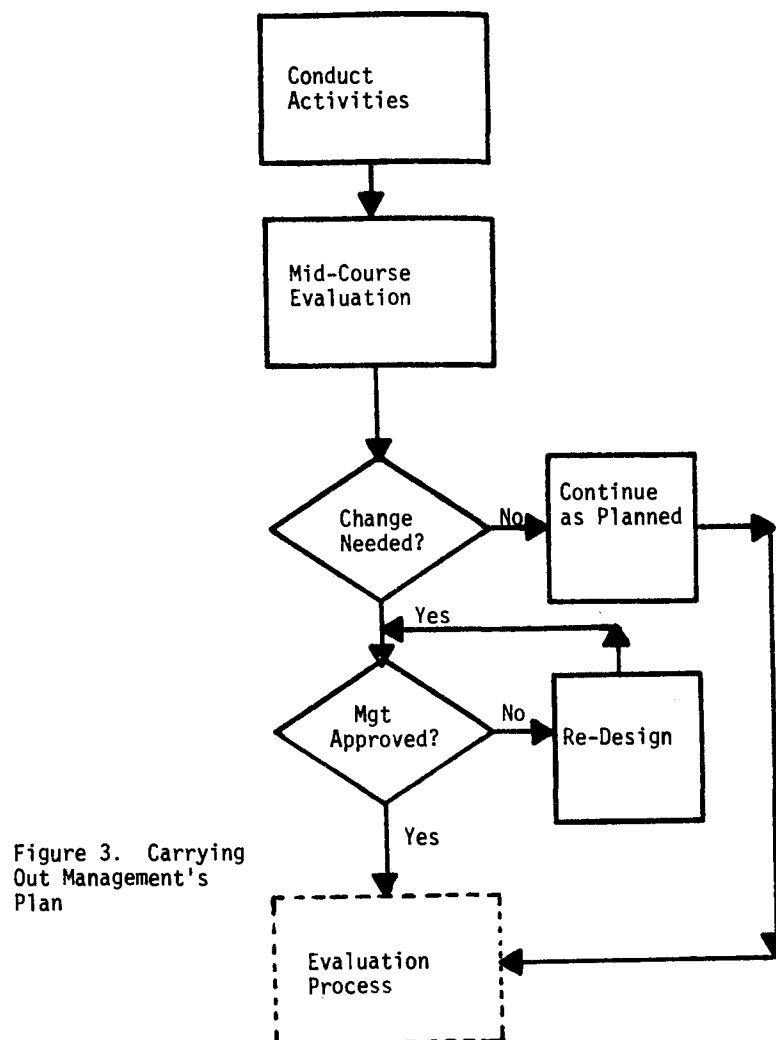


Figure 3. Carrying Out Management's Plan

EVALUATING INTERVENTION RESULTS.

Figure 4 depicts one of the most important aspects of the total effort: the process of evaluation. It is not an evaluation of the organization itself, but making some determinations about the soundness of earlier plans, the appropriateness of the selected strategy, and how well plans were implemented. Two basic questions should be answered here: (1) Were major objectives met; and (2) What impact was made on the organization. As can be seen, negative responses within the evaluation process result in re-entry at various points in the model.

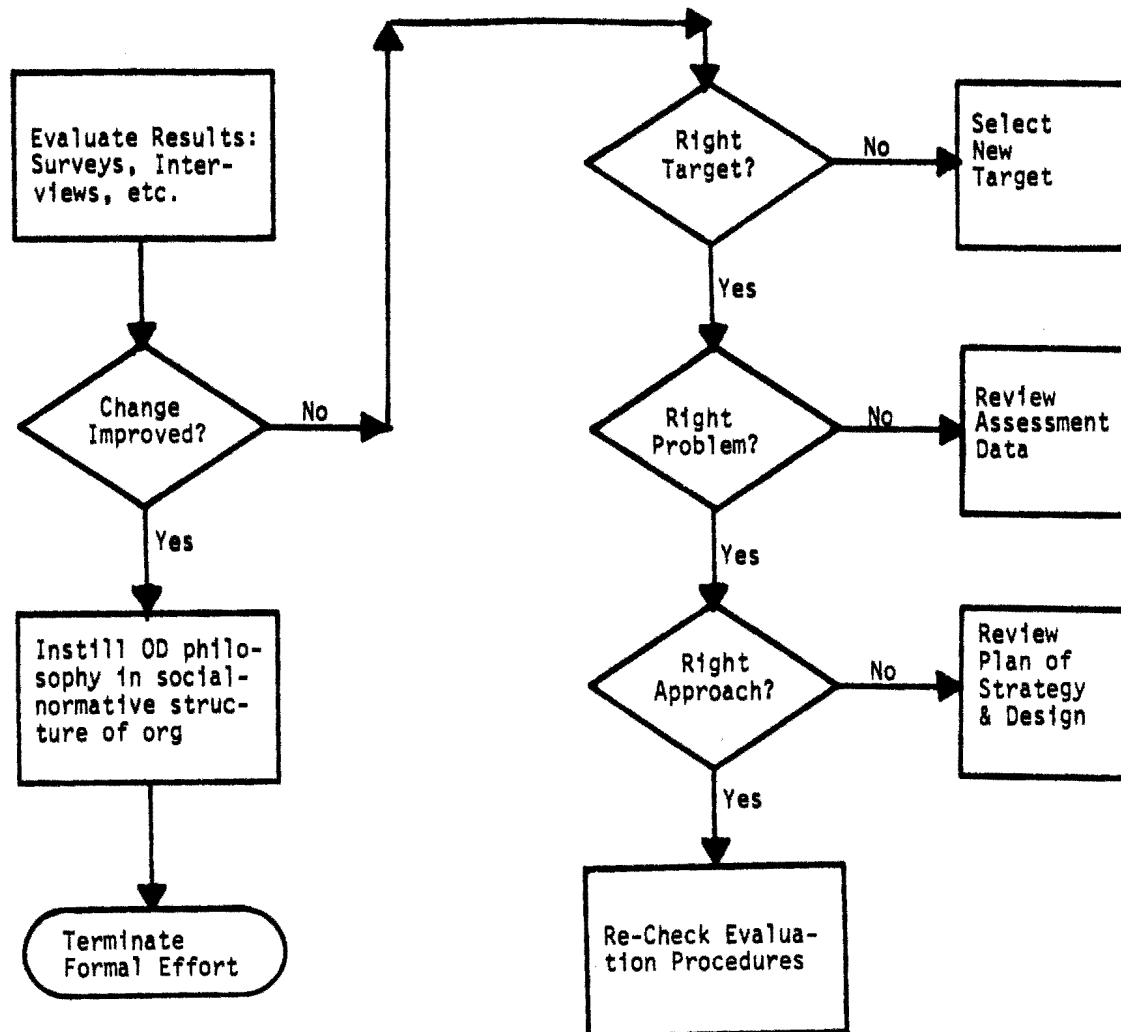


Figure 4. Evaluation Process

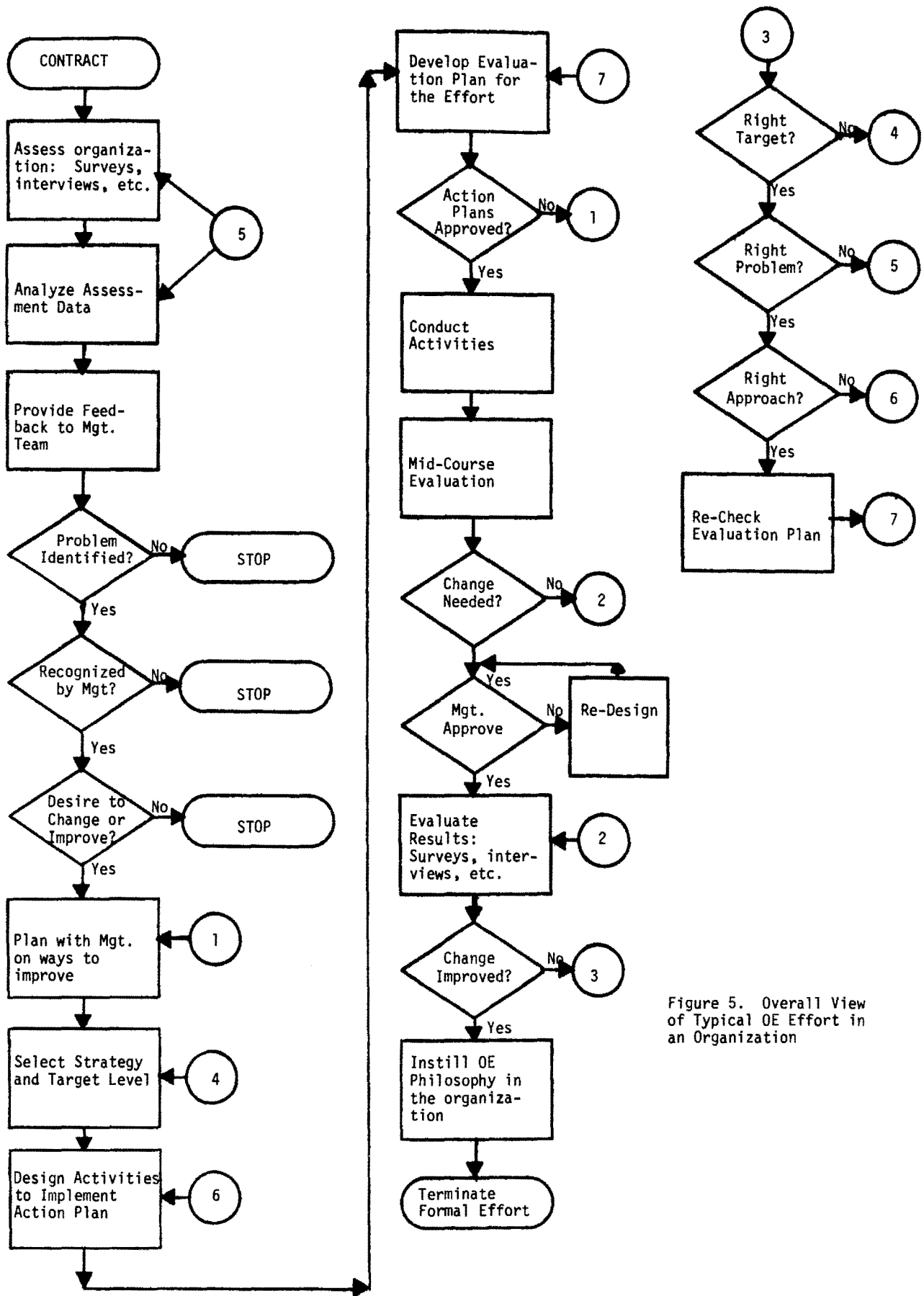


Figure 5. Overall View of Typical OE Effort in an Organization

It should be remembered that the model can be expanded or contracted to correspond to the particular needs of the consultant and the client. Most managers are at least partially familiar with this type of flow diagram and should be comfortable in its use. As an aid for the consultant, the model is very useful to "walk" a client or group of managers through the major portions of an OE application; it outlines the general structure of the OE effort; most importantly, it emphasizes that the activity belongs to the organization, not the consultant. Success or failure of the selected interventions is shown to be largely a function of the organization's management, and rightly so.

SURVEYS - MANAGEMENT TOOLS FOR THE MILITARY COMMANDER

David A. Savard
Ch, Survey & Measurements
Evaluation Directorate

From time immemorial surveys, questionnaires and polls have been used to provide useful information to persons in positions of responsibility and to the general public. The US Army has been deeply involved for several decades in determining the concerns, attitudes, morale and satisfaction of its personnel through the medium of data collected from surveys. The latter phase of WW II and its immediate aftermath provided one of the largest scale survey efforts in the history of the Army. Circumstances combined to provide a large captive audience (the soldier) and numerous highly skilled social scientists (psychologist, sociologist, anthropologists, etc.) resulting in the study of the "American Soldier" which literally made use of several hundred different surveys. Since that time the Army has engaged in numerous other large scale survey efforts including the VOLAR Programs of the late sixties and early seventies to the present extensive surveying of Army personnel which MILPERCEN conducts on an ongoing basis and OETC's survey efforts which include the GOQ, IWS and the large scale evaluation surveys.

The above Army survey activities have produced highly useful information for the Army as a whole. However, until recently the individual installation commander and his staff have not had available a standard package of survey tools which could be used for the gathering of information concerning the perceptions of post personnel regarding various aspects of Army life; leadership, job, career, facilities, environment, etc. It is the purpose of this article to describe an Installation-Wide Survey (IWS) system developed by OETC.

Fort Ord was selected for the Organization Development Pilot Study because of its long-term involvement, interest and proven capability in the behavior motivation and survey instrumentation areas. In 1970, Fort Ord started a special Basic Combat Training (BCT) Survey Program and a tremendous amount of data reflecting the reactions of 200,000 trainees was collected, analyzed and reported on. When the Organization Development Pilot Study became a reality in 1972/73, it took over the BCT Survey Program as a supporting effort for OD. Early in the OD Program a felt need for a similar kind of data, to that provided on the trainees, for permanent members of the Fort Ord military community led to the development of the Installation-Wide Survey System. Three general survey instruments; the Permanent Party Questionnaire (PPQ), (Now - Military Personnel Questionnaire, MPQ), Military Wife Questionnaire (MWQ), and Civilian Personnel Questionnaire (CPQ), were developed and used to gather installation-wide data for the purpose of providing measurements of post and major unit satisfaction.

The Directorate of Organization Development's Pilot Study was completed in June 1975 and then phased into the present Army-wide Organizational Effectiveness training program.

The IWS system had a considerable impact at Fort Ord and is now also in use at several other Army installations. Sufficient interest has been shown in the IWS by TRADOC and FORSCOM Headquarters and individual installations throughout CONUS that two one-week survey courses covering survey design, administration, data feedback, data handling and processing have been conducted by OETC at Fort Ord several times over the past five years. IWS data form a "baseline" or backdrop of the installation climate against which Organizational Effectiveness operations and the overall OE evaluation can be viewed. For the installation commander and the command group, these survey instruments provide information concerning the attitudes and opinions of personnel within the command. Such information has proven very useful at several CONUS installations in establishing realistic courses of action to help improve installation programs.

A secondary purpose is to provide information to subordinate unit commanders as to the satisfaction of their personnel in specific areas and to indicate to staff directors the satisfaction of post personnel with their services and facilities. In designing the installation-wide instruments the intent was to make them relatively simple, unsophisticated, non-diagnostic, non-assessment tools, however, they have turned out to be very responsive and sensitive to change and can be used for limited diagnosis or assessment if desired. A number of items are comparable on all three surveys. All three surveys, too, have the capability of sorting on demographic or background data variables and cross comparisons can be made between the variables. The surveys give emphasis to two areas of primary concern in the Army today: The improvement of professionalism and Army life. In addition they can give indications of possible problem areas, or trends over time.

Administrative procedures call for Survey Control Action Officers (SCAOs) to be assigned in major units and directorates to ensure distribution and return of questionnaires by the designated suspense dates. This approach results in increased returns, a decrease in both paper work and NCO supervisory time, less loss in duty time, and minimizes the antagonism felt by EM and Officers when they are pulled away from the duty section to take a survey. As currently set up, the Survey Control Action Officer procedure facilitates the administration of almost any type of Installation-wide survey and allows it to be handled with minimal confusion and delay while still maintaining a maximum level of confidentiality and anonymity.

All of the IWS instruments were designed to make maximum use of automated data processing procedures and the SURVEY computer program. The optical scan answer sheet designed by OETC can be used for all three questionnaires.

During the last five years the IWS has undergone intensive statistical testing, evaluation and refinement. Data reflecting the opinions and attitudes of approximately 25,000 military and civilian personnel have been gathered, processed, analyzed and reported to appropriate organizations at several CONUS installations.

Each of the surveys includes an optional supplemental section called the Agency Specific Questionnaire (ASQ). This section is utilized by agencies to elicit reactions to the type of quality of services they are providing as well as to tap opinions about areas of specific interest to the agency. Each agency proposes its own questions and becomes the sole recipient of the agency-specific data for its area.

Installation-wide questionnaire results are provided to the command group, subordinate unit commanders, and staff directors. Commanders and directors are asked to disseminate the results within their organizations. Major unit and directorate results are sent only to the appropriate commanders and directors for use in their organizations. CPQ results down to the directorate level are provided to the directors and also to the Civilian Personnel Officer. Results for the agency-specific supplemental questions are sent only to the agencies responsible for the questions.

The overall value of the post-wide surveys is reflected in their current usage as both an information source and an effective management tool. These surveys have the capability of noting "climate changes", and providing feedback to special agencies on the programs and services that they offer. Summaries of the survey results and subsequent actions taken are published in the post news media.

OETC has conducted continuing evaluations of the utility of the installation wide surveys (MPQ/MWQ/CPQ). Conclusions drawn from these evaluations indicate that:

1. Directors and major unit commanders have found the installation-wide surveys to be useful management tools which they would like to see continued.
2. The installation-wide surveys have proven useful and through revisions of questions and extensive use of agency-specific questions in the supplemental area have become very responsive to the needs of the installation.
3. Some typical examples of specific cases where receipt of survey data has caused direct action are presented below:

PMO: Results of the IWS indicated a feeling of insecurity on the part of Post residents about the open-post policy. The PMO was able to

reassure residents that crime had not increased with the open-post policy by publishing an article in the weekly post newspaper.

SJA: Waiting time at the legal office - an area of dissatisfaction pointed out by the Survey - was cut by changing the procedures used in the legal assistance office.

DFAE: Became aware of lack of support to the housing areas - identified the problem - zeroed in on it with a positive action program.

DCE: Findings regarding the welcome of new people - caused DCE to make better arrangements for the welcome of his own personnel.

DIC: Attributed the establishing of local bus service on a scheduled basis to the evidence provided by the "wiggly lines" on the survey results data charts for the post.

4. Directors and commanders who were interviewed concerning the surveys felt that they were worthwhile and should be continued. Some of the reasons given follow:

Post Chaplain: "Gives picture of where people are. Helps to put emphasis on programs in those areas which require publicity - also helps in redesigning of programs."

DCE: "Very good - reminds managers of things which managers need to be reminded of."

10: "Great - especially if used properly. The supplemental items are invaluable."

Additional information concerning IWS implementation procedures, estimated manpower and material costs and schedule aspects for a limited survey capability at a typical CONUS installation are available, upon request, from OETC.

POC for OETC is Mr. David A. Savard, Chief, Survey & Measurements, AUTO-VON 929-7980/4674.

REPORT: ROLE OF THE OESO DURING SIMULATED COMBAT

PERIOD: 8 Sep - 23 Sep 1977

EXERCISE "CARBON EDGE"

Peter B. Dulcamara
OESO

1. The purpose of this report is to outline the proceedings used during application of organization effectiveness throughout a company sized unit under simulated combat on Exercise Carbon Edge, Reforger 1977.

2. The use of "OE" techniques, to include action research and group oriented crises intervention are outlined in the model presented by Greenbaum, Rogovsky and Shalit in their report: The Military Psychologist during Wartime: New Perspective on Action Research and Crises Intervention.

My intention was to relate the situations occurring during the exercise to actual combat through a series of awareness workshops. I also planned to spend 3 to 4 days with each of the company's four platoons facilitating discussion on experiences encountered during the problem. Purpose of these discussions was to allow observations of the participants to be vocalized in the presence of the total group. I felt this would provide a high amount of data to be brought to the conscious level of those groups to enhance the learning available in each situation.

3. During the period spent with the unit, 15 days, I lived and shared experiences with the company commander, soldiers and officers of three platoons. I was available to anyone entering discussion with me.

4. Questions asked during discussion and topics used during the awareness workshops are listed below:

- a. What is your mission?
- b. How should this time be utilized to increase the fighting capability of your unit?
- c. What situations, conditions, problems do you expect at the initiation of enemy contact?
- d. What is your purpose for being here?
- e. What is your primary interest in this field problem?

f. Describe your expectation of the contribution you will make to this exercise.

g. How can the officers and NCOs best assist you to accomplish your mission?

h. How can you best assist other members of your unit to accomplish the mission?

i. Describe the nature of discipline before, during and after battle.

Situations used for "Awareness Workshops":

a. The battle is beginning, shells are exploding and your comrades are dying, and you realize suddenly that you are alone.

b. Your squad has been under severe artillery shelling for many hours. You are cold, hungry and the shelling will not stop.

c. Your platoon leader has been killed and a replacement arrives. This is his first time in actual combat.

d. You have been wounded:

(1) How long do you think it will take for you to receive medical attention?

(2) Will the medical attention you receive be adequate?

Discussion centering on the above questions and Awareness Workshops were conducted during the three day period prior to initiation of the exercise. This period produced feelings and behaviors of boredom, unexpended energy, and uselessness. Comments of soldiers were directed at gathering information. Seeking answers for questions relating to the purpose of the exercise for them, purpose of specific instructions relating to their comfort, purpose for training in the same procedures in the same way continuously.

Discussion topics that produced high interest from participants were:

a. Calm periods of field training should be used for squad level training/relaxation. NOTE: Soldiers interviewed, stated rest was high energy topic. Train ride from home station was an extremely tiring and uncomfortable experience.

b. NCOs and soldiers desire training scheduled to meet the needs of the platoon members. High interest in map reading, day and night patrols in direction of enemy, realism, build time into the

exercise to allow processing of experiences, more cross training at squad and platoon level, use of gas during NBC training.

c. Soldiers stated they would make the following contribution to the exercise: their time, their hard work and assisting senior officers to learn.

d. Problem expected at initiation: Elements of the company will not know what the other is doing.

e. Feeling on discipline was: Before battle, firm energy directed toward providing information, during battle, strict, after battle, relaxed.

Comment. Feedback from participants provided the following information: Discussion developed ideas and explored alternatives. Facilitated an interchange of feelings between soldiers and NCOs.

"Awareness Workshops" were conducted with three groups of 12 randomly selected individuals, three from each of four platoons. Individuals sat on the ground, in a half circle, in front of the facilitator. No overhead cover was used, sky was clear, temperature warm. I explained my purpose was to provide an opportunity for them to think of their reaction to certain combat situations which I would explain. Time was allowed for any questions/reactions. As the situations were verbalized by me, participants reactions varied from sober expressions to uneasy reflex type activity. After each situation was developed, initial responses indicated feelings of uneasiness, unknown situations and hesitancy to discuss feelings experienced. Approximately two hours was spent with each group.

Comment: Concluding comments within the groups indicated individuals experienced difficulty imagining themselves in the situations described because they lacked a real life combat experience. Majority commented that this type of workshop would be more beneficial if the activity were presented after viewing a movie depicting similar situations. After the groups broke and began returning to their individual element, comments became very positive. All comments overheard after group break-up indicated the experience was productive, facilitated an exchange of ideas and increased awareness of dealing with crises oriented combat situations. Significant, I think, is that two days later soldiers were observed discussing the situations and alternatives with peers and superiors who had not attended the workshops.

5. When the exercise began, I directed effort within each of the three platoons, during the time spent with them. Alternatives to situations were discussed. Issues confronted were: tactics, command and control, utilization of time, purpose of soldiers involvement in Reforger, realism of exercise, treatment and utilization of attached elements, and quantity/quality of learning available.

I was asked by several individuals to assist them in exploring alternatives to problems (personal and professional) which they felt were distracting their attention from the mission. At the conclusion of these discussions, all indicated my assistance had been helpful to them. Techniques used were: active listening, productive inquiry, and problem solving.

6. The role of the OESO, operating in the manner described is, a productive method to provide commanders and individuals within units, procedures to increase opportunities for learning during training exercises. As a member of a unit during simulated combat the OESO can provide an active consultation role, providing the following services:

- a. Individual and primarily group solving assistance
- b. Information gathering from officers, NCOs and soldiers throughout the organization
- c. Data analysis and feedback
- d. Continuous assessment of unit
- e. Joint planning with unit members to overcome identified problems
- f. Training unit members in organizational effectiveness techniques
- g. Facilitating group learning experiences
- h. Assist in identification of: high stress situations, unproductive training procedures, functional/dysfunctional procedures/relationships and other topics of interest to the commander.

Additionally, I feel the OESO will be a valuable asset to organizations before, during and after actual combat.

OE and Combat Preparedness:
The Ultimate Criterion

CPT Thomas J. Pickering
HQ 8th INF Div.

The basis of my comments is found in "Components of Organizational Competence: Test of a Conceptual Framework" which was a HumRRO study conducted in August 1973. After the completion of 24 months of OE work, it is my opinion that the survivability of OE will depend on its capability to enhance the combat preparedness of military units. Quoting from the above study, "To be effective, every military organization must efficiently identify and cope with problems that arise within its operational environment. The necessity for continuous readiness and quick reaction in turbulent and unpredictable environments places a premium upon the capability of the organization to respond flexibly to a more or less constant flow of uncertain situations. Furthermore, technological advances in weapon systems, electronics and communications complicates both organizational decision processes and the execution of required operations."

Clearly, these capabilities depend upon human factors and this is where OE can make its money, even though some technological assets can be provided in improving unit effectiveness. For example, on a recent major field exercise, a facsimile communications machine was used for the compilation and processing of critical operational data. It is this type of integration of machine, mission and personnel that will hold OE more accountable in the eyes of the Army's senior commanders.

Since it is my belief that the accountability of OE and the Army will depend on what contributions it can make to enhance combat preparedness, it goes without saying that the classical application of OE as chartered by OETC can also be applicable to this type of environment by studying:

- a. The formal body of policies, procedures and doctrine intended to direct decisions and actions.
- b. The quality of techniques used in the performance of activities.
- c. The adequacy of equipment that assist in the performance of required activities; and lastly,
- d. The training and skills of personnel both collectively and individually.

During a recent field exercise, I had the opportunity to participate in an ARTEP and MTOE evaluation from which it became readily apparent

that an OE role of assessing the combat reporting system of scout sections from observers to map plotters to analyzers, and the concomitant communications network is exactly the type of illustrative role OE must assume in a combat training environment to gain the potential and results senior leaders expect, and rightfully so.

This, in a summary, represents not a case study, but one man's opinion of the direction OE will have to take to survive in an era of increasing accountability to members of the military and the public alike.

THE BIRTH OF THE OENCO

CPT Peggy Stubbs
HQDA (DAPE-EPA)

The Army's Organizational Effectiveness Program is to be expanded in the near future by the addition of the NCO Corps. This plan is not new to the OE community; it has been discussed, studied, and analyzed since the inception of the OE Program. Recently, this proposal has moved from the discussion to the planning and implementing stages.

Initially, the plan began to take shape in June 1976 when TRADOC initiated a study to determine the role of the NCO in OE. At that time three NCOs were selected by TRADOC and cleared by MILPERCEN to attend the OE Staff Officer's Course (OESOC) in August 1976. Simultaneously, DA DCSPER tasked the USA Administration Center to prepare an in-depth study of the role of the NCO in OE. In December 1976 a staff visit was made by TRADOC to OETC to discuss problems encountered pertaining to NCOs attending OESO course. Based on the results of the foregoing studies and reports, in May 1977 TRADOC forwarded a letter to DA, Director of Human Resources Development recommending that a pilot course for OENCOs be implemented in January 1978. Since that time, the role of the NCO in OE has been a major area of discussion at the 1977 June and October General Officer Steering Committee meetings as well as the FORSCOM OE conference in September and the TRADOC OE conference in October.

Basically, the program has been developed along the guidelines set forth in the October 1977 GO Steering Committee meeting. One of the major tasks of the committee was to formalize the reasons why NCOs should be included in the Army's OE program. Three principles formed the core of the answer: OE works better when facilitated by teams and implementation of the team concept using all officers would tax officer distribution unnecessarily; a well trained NCO can become a fully functional member of an OE team; and the officer/NCO team complement one another by providing an increased perspective.

In addition, there has been strong feedback from the field indicating that enlisted personnel perceive OE as an "officer" program. Studies have shown that NCOs, particularly senior NCOs (E7-E9), have more credibility with other NCOs than officers, and senior NCOs have a high degree of credibility Army-wide based on their years of experience within the Army structure. Since the majority of current OE efforts are conducted at battalion and company level, where the NCO population is most heavily concentrated, the addition of senior NCOs to the OE team should have a major impact on the program by helping the credibility of OE in the eyes of enlisted personnel in the Army.

to be assigned as staff and faculty, as instructors/development directorate personnel for the pilot courses. All are currently present in Class 3-78. Forty-five person pilot courses, the second phase of the training plan, are tentatively scheduled for 11 January 1979 and May 1979. DA, DCSPER dispatched a message (DAPE-HRO MSG 121704Z APR 78) to the field which outlines criteria for attendance at the pilot course. Phase three will consist of an evaluation of the graduates' performance as practicing OENCOs.

Upon the determination that the pilot course graduates have been successful as OENCOs, OETC will then begin to conduct OENCO courses on a scheduled basis. Students will attend TDY en route to PCS or TDY and return to parent unit. Upon graduation, OENCO would be required to serve a 12-36 month utilization tour with an OESO.

A screening board has been established at the Enlisted Personnel Management Directorate (EPMD) MILPERCEN to screen all applicants for the pilot and the subsequent OENCO courses. Projected selection criteria now include the following: NCO must volunteer; grade E7, E8, E9, and selected E6; proficient in primary MOS; advanced NCOES graduate (if appropriate for soldiers's MOS); open to male and female soldiers in all MOS; high potential for promotion; interview/briefing by OESO, desired; 2 years college, desired.

The composition of EPMD's screening board is similar to that for officers in OPMD. EPMD's concern for a thorough screening is three fold. The first consideration must be how the loss of highly qualified NCOs for 12-36 month periods will affect overall mission effectiveness. This function will affect the acceptance into the program of those NCOs in critically short or strength imbalanced MOSs. The second concern is the possible effect participation in the program will have on each NCO individual career progression. Only those NCOs with strong, highly competitive files should be allowed into the program inasmuch as the soldiers will be out of the mainstream of their primary MOS for 12-36 months. Ensuring top quality personnel for inclusion into the OESO community is a third and vital concern for EPMD. Thus, the basis for the selection criteria is being set with high professional and educational standards. The NCO Corps should have no problem meeting these standards, since over 7,500 NCOs in grades E7, E8, and E9 have two or more years of college credit. Even by disqualifying all NCOs in current shortage or space-imbalanced MOS, 4,354 NCOs would meet the educational requirements.

The success of the project from this point will depend greatly on proper screening and selection of qualified NCOs, quality of the NCO pilot course of instruction, and the working relationships established by OESOs and OENCOs within their respective working environments.

For questions concerning OENCO selection, attendance quotas, and class dates, contact HQDA (DAPE-HRO, MAJ Chung, AV 227-3700/6025 and DAPE-EPA, CPT Stubbs/LTC Wolfe AV 221-7692/9328). For questions concerning course content, contact OETC (OETC-TD, LTC Brown/SFC Hines 929-7058).

CASE STUDY

ORGANIZATIONAL EFFECTIVENESS (OE) IN AN
ARMY RESERVE COMMAND (ARCOM)

By Major John P. Emington
OESO - HRD
ODCSPER
HQ FORSCOM

SUBJECT: Case Study - Organizational Effectiveness (OE) in an Army Reserve Command (ARCOM)

The VCSA opened the Reserve Component Issues Conference (RCIC), 21 September 1977, by stating that we need hard facts and an action package. He also stated that we must face and deal with people problems and concluded his remarks by asking, "What do we have to do to turn the strength around?"

This case study is significant for a number of reasons:

- a. The OE effort described appears to be having a significant impact on retention in a major RC unit.
- b. It describes the first attempt to utilize the organizational effectiveness (OE) process by a reserve component commander.
- c. It describes in detail the first attempt to apply the OE process to an 8,500 person organization.
- d. It represents the first time two major headquarters (ARCOM and CONUSA) have participated jointly in action planning.
- e. It provides the most complete experience base from which the joint planning committee on OE in the RC will develop the plan for institutionalization of OE in the Reserve Components.
- f. It describes unique aspects of OE utilized by consultant firms and industry, but not taught at the OE Training Center or used in Active Component OE activities.

The organization is an Army Reserve Command consisting of 110 subordinate organizations physically disbursed across one state and composed of 8,500 US Army Reserve personnel. The headquarters of the major general command controls subordinate units based on geographical location rather than functional type although most fall into the categories of combat support or combat service support. (Most combat arms units fall under the Army National Guard.) The organization meets only 38 days per year, including summer camp.

The operation began in June 1976 with a request from the ARCOM to FORSCOM headquarters (CONUSA had no OESO at that time). HQ FORSCOM OESO briefed the ARCOM Chief of Staff on the OE process. The Chief of Staff and senior advisor decided to employ the OE process with improvement of the ARCOM's retention rate as the target. Critical

considerations at this point which required discussion, agreement and commitment were:

a. The OE effort must have the backing and commitment of CG and principal staff and actions must be taken to address issues surfaced or expectations would be raised to no avail and the situation would only be worse.

b. Retention is not a problem - but rather the symptom of problems involving the organizational climate. The assessment would focus on climate and issues could be expected to surface in any area. All must be addressed.

c. Issues surfaced during the assessment would fall into three categories--those nothing can be done about at ARCOM level, those which can be resolved at the ARCOM policy level, and those issues which permeate all levels of the command, for which long-range activities will be required before noticeable effect can be realized.

d. The OE effort is and will remain the CG's project--not the HQ FORSCOM OESO's project. He directs it, controls it, and has the option to stop it at any point. The HQ FORSCOM OESO remains in a consultant role.

e. Resources in terms of manpower and man-days will be required to make the assessment a valid one. As little time as possible must elapse between initiation of assessment activities and implementation of action plans or the data will be outdated.

f. The assessment must involve a representative sample of the ARCOM's personnel. A tailored questionnaire must be backed up by group interviews of horizontal slices of the organization (E-1 through E-4, E-5 through E-7, and E-8 through O-3).

g. A team must be trained to administer the survey and conduct the group interviews. Personnel for this team must be carefully selected as they will represent the commander and their demonstrated personal integrity as perceived by the interviewees, will impact directly on the quality of information gathered. Team members must be hand picked from personnel with the following prerequisites: a background in the behavioral sciences, knowledgeable in ARCOM organization and functions, civilian career involves dealing with people, and demonstrated ability to communicate effectively.

Understanding fully what impact an OE effort of this magnitude would have on his organization as well as the possible results and having committed himself and his organization to the effort, the ARCOM CG

informed the CONUSA commander of his intentions and officially requested of HQ FORSCOM support in terms of data processing and one OESO.

On 14 and 15 August 1976, 40 officers and enlisted personnel received training in survey administration and group interview techniques. At this time also, an Assessment Team Chief (O-6) and OE Project Officer (O-5) were designated by the ARCOM CG. Subsequent to this session, the Assessment Team Chief developed the detailed schedule of visits to subordinate commands and coordinated the funding of man-days. HQ ARCOM sent out a letter to all subordinate commanders explaining the OE process and the assessment in particular. It clearly indicated the CGs support and commitment.

Assessment activities covered the period September 1976 through March 1977. 2,500 survey instruments were administered and group interviews were conducted in every subordinate organization having a strength of 25 people or more.

23 thru 25 March 1977, HQ FORSCOM OESO and HQ CONUSA OESO, newly assigned, met to analyze the computer printout of survey results and all the new data from the group interviews. The result was a data presentation package which was briefed on 12 April 1977 to the ARCOM CG, CofS, principal and special staffs, and senior advisor. The data was broken down into:

- a. Assessment agent concerns and expectations.
- b. Most important reenlistment considerations--survey identified.
- c. Survey identified strengths.
- d. Survey identified dissatisfaction indicators.
- e. Interview identified strengths.
- f. Interview identified dissatisfaction indicators.
- g. Subordinate commander's issues.

Immediately following the data feedback session, planning began for an action planning workshop for the purpose of dividing the issues into those which could not be resolved at ARCOM level, those which could, and those which permeated the entire organization. It was also decided at that time to brief the CONUSA commander on all the data because it was felt that most of the issues were problem areas in

all ARCOM's and to seek his support for future action planning workshops involving representatives from CONUSA staff and representatives from all levels of the ARCOM.

On 28 June 1977, the CONUSA Commander, his principal and special staffs, were briefed on all the assessment data. Recommendations were made at that time that the data be briefed to the FORSCOM Commander and that action planning workshops be hosted at ARCOM, CONUSA, and FORSCOM on issues unique to those levels. One of these recommendations was approved. The CONUSA Commander committed his staff to participate in action planning workshops at ARCOM level so that all issues resolvable at ARCOM level would be completed prior to anything being brought up the chain of command.

On 20 August 1977, the first action planning workshop was held with participation from all levels of the ARCOM and representatives from the Readiness Group, Readiness Region, and CONUSA staff. The problem area singled out for this first workshop was, "The feeling on the part of ARCOM reservists that there is no challenge in training and that their training abilities and usefulness as individuals are wasted in the Reserves." The recommendations resulting from this workshop are shown at Inclosure 1. The format for action plans identified the specific action recommended, the expected result, the tasked officer or agency, the officer having operational control, and reasonable suspense date, and a method for evaluation. Participants were divided into four work groups with an equal mix of rank and functional area so that each group had experts in every field and representatives from all levels.

An important by-product of this workshop was the face-to-face sharing of information between CONUSA principal staff members and persons in many grades and positions from ARCOM level down to platoon level.

PROBLEMS ENCOUNTERED

Problem: Possibly unique to the client organization was difficulty and confusion in notification of the selected assessment agents by letter explaining the OE process, rationale for selection, and the time and place of the training session.

Impact: Assessment agents did not know until they reported for their normal drill that they were to spend the entire drill session away from their normal duties. They had no idea why they were there or what the OE process was all about. It took a considerable amount of critically important training time to work through those issues and gain the commitment of the group.

d. Reserve Component members seem to be more receptive to the OE process than active component members, in the experience of this OESO. Many of them use consultants in their civilian positions and understand the service they can provide.

FUTURE ACTIVITIES

Internal agents will be trained in data analysis and data feedback techniques. They will then prepare data feedback briefings utilizing ARCOM-wide data, unit specific data printouts, as well as unit specific group interview data and return to the subordinate units they visited during the assessment phase. The internal agents will also be trained in group action planning workshop facilitation.

It is anticipated that additional action planning workshops will be held for CONUSA and ARCOM representatives.

RESULTS TO DATE OF THE OE EFFORT

A number of actions have been taken by the ARCOM staff based on recommendations surfaced during action planning workshops which have had dramatic effect. One example--the assessment revealed that the procedure for recommending a soldier for a Certificate of Achievement was time consuming and cumbersome. Thus, unit commanders did not use it often as a reward. The staff streamlined the procedure during ten minutes in a workshop and sent a letter to the field explaining the simplified procedure. Prior to this action, the CG averaged 4-10 signatures on Certificate of Achievement per month. He has now signed almost 300 in a two-month period. Unit commanders who did not feel this was an efficient tool with which to reward outstanding performance now have a much more simplified procedure and they are using it.

But what about retention? The reported reenlistment rates for FY 77 are as follows:

| | |
|--------|------------------------------|
| Oct 76 | 28.7% |
| Nov 76 | 28.8% |
| Dec 76 | 35.9% |
| Jan 77 | 29.6% |
| Feb 77 | 51.0% |
| Mar 77 | 51.5% |
| Apr 77 | 63.3% |
| May 77 | 54.2% |
| Jun 77 | 52.0% |
| Jul 77 | 45.4% |
| Aug 77 | 69.5% |
| Sep 77 | 74.8% (an increase of 46.1%) |
| Oct 77 | 65.3% |
| Nov 77 | 57.4% |
| Dec 77 | 68.7% |
| Jan 78 | 81.1% |
| Feb 78 | 77.8% (an increase of 49.1%) |

Recommendation: All activities, no matter how thoroughly planned, must be allotted a great deal of preparation time. The impact of meeting only 38 days per year, or two days per month cannot be overstressed.

Problem: Continual changes to planned activities.

Impact: Many activities which had been contracted for a specified period of time suffered in quality when less time was allocated on short notice. This is the precise type of process which also tends to undermine effective training in RC units.

Recommendation: Contracting for each activity must include the OESO's clarification of the impact on success if the plan is not followed as agreed upon.

Problem: Physical separation of the OESO from the client organization.

Impact: Many decisions are made by the client commander or his staff which have very negative effects on planned OE activities without discussion with the OESO and are irreversible by the time the OESO is able to provide information.

Recommendation: OESOs, when dealing with RC, must take the initiative in maintaining frequent contact with their client organization POC.

Problem: OE activities in Reserve Component units are very expensive in terms of man-hours.

Impact: OE takes time. Two days in a RC unit represent an entire month.

Recommendation: That OESOs clearly identify the cost in initial contracting sessions.

LESSONS LEARNED TO DATE

a. Full four-step OE interventions with ARCOM-size organizations must involve training of internal agents in assessment techniques.

b. Coordination of OE activities becomes extremely difficult when the OESO is not co-located with the serviced unit.

c. Reserve Component organizations desiring to participate in OE activities must be carefully briefed on the cost in terms of manpower, man-days, and TDY so they may consider the impact OE activities will have on other priorities.

These figures represent quantifiable improvement in the effectiveness of the ARCOM organization. How much of the total improvement can be directly attributed to the use of OESOs and the four-step OE process cannot be clearly established.

IMPACT ON READINESS

The organizational effectiveness process is an effective tool for use in resolution of operational problems. It can be understood through the analogy of oil used to make existing parts function together more efficiently. In this case study of OE in a major unit, it will be noted that no drastic policy changes took place, no personnel were relieved, nor job descriptions rewritten. Nothing happened to introduce trauma into the organizational climate. OE is uniquely effective when used to address complex problems which do not fall neatly into any particular functional area. The organizational effectiveness process will focus the unit on effective use of available time, maximum functioning with limited resources, retention of quality personnel, role and goal clarification, clarification of priorities, command and staff interface, communication skills at all levels--any problem area having a negative impact on readiness.

In the words of one RC unit commander, "We are continually reminded that we have problems. Organizational effectiveness is the first tool anyone has offered us to help us solve those problems."

JOINT ARCOM/CONUSA ACTION PLANNING WORKSHOP ATTENDEES

CONUSA

DCSLOG 06
DCSRT 06
DCSRT 06
DCSPO 06
DCSPA 04
DCSPA 04

ARR

Deputy Cdr 06
Dir Ind Tng 06

RG

Deputy Cdr 05
04
E8

ARCOM HQ

CO 07
C/S 06
C/S Augmentee 06
DCSPO 06
Dep DCSPO 06
DCSPA 06
DCSRM 06
TMO 05
RRO 05
DCSLOG 04
OE Assessment
Team Chief 06
OE Project
Officer 05

SUBORDINATE UNITS

Cdr, Psyops Co 04
Cdr, FA Btry 03
Hospital Unit 04
Maint Unit CW3
CA Group E9
FA Unit E9
MP Unit E5
Maint Unit E6
Field Hosp Unit E5
Field Hosp Unit E7
Hosp Unit E5

HEADQUARTERS, U.S. ARMY RESERVE COMMAND

GENERAL ORGANIZATIONAL SURVEY

BOOKLET NUMBER _____

CARD NUMBER _____

U.S. ARMY RESERVE COMMAND
GENERAL ORGANIZATIONAL SURVEY

This survey is being given to several hundred randomly selected members of the 4th ARCOM, to obtain opinions concerning management activities, operations, and morale. The information will be used to review and improve ARCOM operations.

Your responses will be grouped with several hundred others, and you will not be identified either individually or by unit. It is important that we get your responses, but it is completely voluntary. If you chose not to take the survey, please return it to the Survey Control Officer now.

Please give your own opinions. Do not consider how others will answer. Do NOT put your name or social security number anywhere on this booklet.

INSTRUCTIONS

Read each question and choice of answers carefully. Decide on your response, then circle the appropriate number to the right of the question.

Please give only one response to each question. As soon as you understand a question, answer it immediately. Your first impressions are more valuable than your second thoughts.

Please answer all questions. If no answer category exactly expresses your thoughts, use the best answer available.

DISCUSSION GROUP NUMBER 1

PROBLEM STATEMENT; 1A -- TRAINING ENVIRONMENT/PROGRAM NOT COMPLETELY ACHIEVING OBJECTIVE

| Item | Recommended Action | Expected Results | Done by Whom | Report To | Done By When | How Evaluated |
|------|--|------------------|-------------------|-----------|--------------|---------------|
| 1 | Eliminate Unsat Participation | | DCSPA | CS | 30 Nov 77 | |
| 2 | Conduct exit interview prior to elimination if available. | | DCSPA | CS | 30 Nov 77 | |
| 3 | Get to know soldier. | | Cdr, NCO, Sqd Ldr | | | |
| 4 | Involve Company level personnel in formulation of 3-yr tng program. Establish tng mgt workshops at Bn level and assistance from RG, | | DCSOI | CS | 24 Sep 77 | |
| 5 | Make support centers available on weekends. | | DCSOI | CS | 17 Dec 77 | |
| 6 | Add greater emphasis on realism of tng. More mutual supporting tng between units. Make it possible for us to do what we are trained to do. | | DCSOI, Cdr | CS | 26 Oct 77 | |
| 7 | Develop tng situation around SQT and ARTEP. | | DCSOI | CS | 19 Nov 77 | |
| 8 | Analyze, plan, conduct, and evaluate current tng plan, program, procedures priorities. | | DCSOI | CS | 29 Oct 77 | |
| | | | | | | |

INC 1

DISCUSSION GROUP NUMBER 1

PROBLEM STATEMENT: 1B --

TRAINING YEAR DRIVEN BY AGI AND LARGE PORTION FOR AT.

AGI HAS AN UNFAVORABLE IMPACT ON TNG YR

| ITEM | Recommended Action | Expected Results | Done By Whom | Report To | Done By When | How Evaluated |
|------|--|------------------|--------------|-----------|--------------|---------------|
| 1 | Re-examine purpose of AGI, Scope redundancy. | | DCSPA | CS | 13 Oct 77 | |
| 2 | AGI focus only on tng & mgt at company level. | | IG | CS | 15 Oct 77 | |
| 3 | Reduce frequency of AGI to every 2 years. | | IG | CS | 31 Oct 77 | |
| 4 | Conduct AGIs during AT. | | IG | CS | 31 Oct 77 | |
| 5 | IG inspect pay, admin, attendance problem, supply, unit fund. | | IG | CS | 30 Nov 77 | |
| 6 | IG establish reasonable standards. Pen & ink type changes should be necessary. | | IG | CS | 5 Nov 77 | |
| 7 | Rebuild basic skills in individual tng. | | DCSOI | CS | 30 Sep 77 | |
| 8 | Request temporary exemption from AGI - Trial Basis. | | IG | CS | 30 Nov 77 | |
| | | | | | | |

DISCUSSION GROUP NUMBER 1PROBLEM STATEMENT; 1C --LACK OF KNOWLEDGE OF HOW TO TRAIN

| Item | Recommended Action | Expected Results | Done by Whom | Report To | Done By When | How Evaluated |
|------|--|------------------|--------------|-----------|--------------|---------------|
| 1 | Teach short courses on method of instruction. | | DCSOI | CS | 12 Nov 77 | |
| 2 | Train the trainer. | | DCSOI | CS | 12 Nov 77 | |
| 3 | Insure qualified instructors are utilized. | | DCSOI | CS | 12 Nov 77 | |
| 4 | Have one officer and NCO as additional duty as tng mgrs. | | DCSOI | CS | 30 Sep 77 | |
| 5 | Establish learning center. | | DCSOI | CS | 30 Nov 77 | |
| 6 | Make provisions for refresher tng. | | DCSOI | CS | 30 Nov 77 | |
| 7 | Provide tng mgt workshops 2 days | | DCSOI | CS | 22 Nov 77 | |
| 8 | Conduct workshop on obtaining training aids | | DCSOI | CS | 24 Sep 77 | |
| 9 | Make true evaluation of staff tng assistance. | | DCSOE (CPO) | CS | 30 Sep 77 | |
| 10 | Make more funds available to support training. | | DCSRM | CS | 29 Oct 77 | |
| | | | | | | |

PROBLEM STATEMENT: 2A --

HOW TO ESTABLISH & ADMINISTER A TRAINING PROGRAM THAT
WILL EFFECTIVELY TRAIN WITHIN TIME AVAILABLE, INDIV &
UNITS TO A LEVEL OF PROFICIENCY WHICH WILL PERMIT MSN
ACCOMPLISHMENT AND MEET INDIV PERS & PROFESSIONAL NEEDS.

| Item | Recommended Action | Expected Results | Done by Whom | Report To | Done By When | How Evaluated |
|------|--------------------------------------|--|---------------|-----------|---|--|
| 1 | Initiate Training Mgr Course. | More effective tng mgr | DCSOI (RG) | CS | Start by Nov 77, complete by end of FY-78(Prov) | Post CSE Evaluation; sample survey 1 yr later. |
| 2 | Co Cdr conduct Trng Course. | Co Cdr awareness of tng methods & ability to evaluate. | DCSOE (RG) | CS | Start Nov 77 complete by end FY-78. | Post CSE evaluation; sample survey 1 yr later. |
| 3 | Attend AT MOS/MOE tng in lieu of AT. | More tng & qualified pers. | DCSOE (DCSRT) | CS | 1 Oct 77 | Publish guidelines |
| 4 | Attend AT Army Svc School. | More Tng & qualified pers. | DCSOE | CS | 1058 60 days prior to crse date | |
| | | | | | | |

DISCUSSION GROUP NO. 3

PROBLEM STATEMENT; 3A --

TRAINING MANAGERS (UNIT COMMANDERS) DO NOT
DEVOTE ADEQUATE RESOURCES TO TRAINING

| Item | Recommended Action | Expected Results | Done by Whom | Report To | Done by When | How Evaluated |
|------|--|--------------------------|--------------|-----------|--------------|-----------------|
| 1 | Review requirements | Co Cdt has more time. | | | | |
| 1a | Revise Jumps, RC | More accuracy payroll | DCSRM | CS | 30 Nov 77 | Selective units |
| 1b | Change discharge auth or ARCOM level (Phantom). | Co Cdr has time for unit | DCSPA | CS | 30 Nov 77 | |
| 1c | Reduce frequency of inspection | same as above | DCSOI | CS | 29 Oct 77 | |
| 1d | Review policy of retention interview. Reduce or revise to a lower level. | same as above | ORR | CS | 30 Nov 77 | |
| 2 | Improve the quality of DA Civ Program | | | | | |
| 2a | Convert to AD pers | Better control | CPO | CS | 17 Dec 77 | |
| 2b | Upgrade standards and pay rating GS rating. | Better qualified people. | CPO | CS | 17 Dec 77 | |
| | | | | | | |

DISCUSSION GROUP NUMBER 4

PROBLEM STATEMENT: 4A -- HOW TO PROVIDE COMPETENT UNIT LEADERS WITH THE SKILLS TO TRAIN

| Item | Recommended Action | Expected Results | Done By Whom | Report To | Done By When | How Evaluated |
|------|--|-----------------------------|------------------|-----------|----------------------|---------------|
| 1 | Send new Co Cdrs to unit leader-leadership course. | | DCSOI, TMDO, ARR | CS | When available (Oct) | |
| 2 | Use Tng Mgt assistance program. | | TMDO | | now | |
| 3 | Disseminate RC Cdr's Guide | | AG | CS | | |
| 4 | Get enough copies for everyone - Submit request. | Co can max with info in it. | DCSRT | CS (GP) | Open | |
| 5 | Go overstrength on Co grade officer. | Ease admin burden | DCSPA | CS | Mid-Sept. | |
| 6 | Allocate man/day spaces to Co level. | | DCSRM | CS | 30 Sep 77 | |
| | | | | | | |

DISCUSSION GROUP NUMBER 4

PROBLEM STATEMENT: 4B -- HOW TO EVALUATE THE LEADER TO MAKE MAXIMUM USE OF TRAINING TIME AVAILABLE

| Item | Recommended Action | Expected Results | Done by Whom | Report To | Done By When | How Evaluated |
|------|--|--|-----------------------|-----------|-----------------|-----------------------------|
| 1 | Task instructors regardless of rank, use JR EM | Give more time to CO for other duties. | Co Cdrs | | | |
| 1a | Write letter of instruction | | DCSOE | CS | 10 Sep 77 | Staff will check on visits. |
| 1b | Staff spread the word. | | DCSOI | CS | 10 Sep 77 | |
| 1c | Conduct Cdr's Conf | | DCSOI | | | |
| 1d | Visit Cdrs to explain what is avail. | Better use of avail assets | DCSOI w/ RECORD Asst | | Today Agreement | |
| 1e | Leave information with Cdr. | | DCSOI w/ REDCORD Asst | | 10 Sep 77 | |
| | | | | | | |

DISCUSSION GROUP NUMBER 4

PROBLEM STATEMENT: 4C --

HOW TO REWARD AN INSTRUCTOR FOR A GOOD CLASS

[illegible]

| | | CIRCLE ONE ANSWER | | | | | KEY PUNCH USE ONLY |
|----|--|-------------------|----|----|----|----|-----------------------|
| A. | What is your present rank? | -1 | -2 | -3 | -4 | -5 | 5. |
| | 1) PFC or below | | | | | | |
| | 2) E-4 | | | | | | |
| | 3) E-5 | | | | | | |
| | 4) E-6, E-7, E-8, E-9 | | | | | | |
| | 5) Officer | | | | | | |
| B. | How many years have you been in the Reserve? | -1 | -2 | -3 | -4 | -5 | 6. |
| | 1) 2 years or less | | | | | | |
| | 2) 2 - 3 years | | | | | | |
| | 3) 4 - 6 years | | | | | | |
| | 4) 7 - 10 years | | | | | | |
| | 5) over 10 years | | | | | | |
| C. | What level of education have you completed? | -1 | -2 | -3 | -4 | -5 | 7. |
| | 1) less than 12th Grade | | | | | | |
| | 2) high school graduate | | | | | | |
| | 3) some college | | | | | | |
| | 4) college graduate | | | | | | |
| | 5) post graduate work | | | | | | |
| D. | Which of the following best describes your intentions concerning reenlistment? | -1 | -2 | -3 | -4 | -5 | 8. |
| | 1) I definitely <u>will not</u> reenlist | | | | | | |
| | 2) I am not sure but <u>probably will not</u> reenlist | | | | | | |
| | 3) I am <u>undecided</u> | | | | | | |
| | 4) I am not sure but <u>probably will</u> reenlist | | | | | | |
| | 5) I definitely <u>will</u> reenlist | | | | | | |
| E. | What is your marital status? | -1 | -2 | -3 | -4 | -5 | 9. |
| | 1) Single | | | | | | |
| | 2) Married with children | | | | | | |
| | 3) Married without children | | | | | | |
| | 4) Divorced | | | | | | |
| | 5) Other (separated, widowed) | | | | | | |
| F. | What is your age? | -1 | -2 | -3 | -4 | -5 | 10. |
| | 1) 17 - 20 | | | | | | |
| | 2) 21 - 25 | | | | | | |
| | 3) 26 - 30 | | | | | | |
| | 4) 31 - 40 | | | | | | |
| | 5) 41 or older | | | | | | |
| G. | Are you male or female? | -1 | -2 | | | | 11. |
| | 1) male | | | | | | |
| | 2) female | | | | | | |

- H. The population of the city in which you reside is:
- 1) under 10,000
 - 2) 10,000 - 40,000
 - 3) 40,000 or larger

-1 -2 -3

CIRCLE ONE ANSWER

KEY PUNCH
USE ONLY

12.

DO NOT ANSWER

FOR KEY PUNCH OPERATIONS ONLY

I. Unit type

-1 -2

13.

CIRCLE ONE ANSWER

1. Strongly disagree
2. Somewhat disagree
3. Undecided
4. Somewhat agree
5. Strongly agree

JOB SATISFACTION

- | | | | | | | |
|--|----|----|----|----|----|-----|
| 1. I am satisfied with my job in the Army Reserve. | -1 | -2 | -3 | -4 | -5 | 14. |
| 2. I am proud to be a member of this unit. | -1 | -2 | -3 | -4 | -5 | 15. |
| 3. My job in the unit gives me a feeling of accomplishment. | -1 | -2 | -3 | -4 | -5 | 16. |
| 4. Belonging to this unit is important to me. | -1 | -2 | -3 | -4 | -5 | 17. |
| 5. Considering the skill and effort I bring to my job, I am satisfied with what the Army gives me in return. | -1 | -2 | -3 | -4 | -5 | 18. |
| 6. I can be creative and innovative in my work. | -1 | -2 | -3 | -4 | -5 | 19. |
| 7. My talents and abilities are being utilized by the unit. | -1 | -2 | -3 | -4 | -5 | 20. |

COMMUNICATIONS

- | | | | | | | |
|--|----|----|----|----|----|-----|
| 8. My duties are fully explained to me. | -1 | -2 | -3 | -4 | -5 | 21. |
| 9. I am given advance notice when my job duties are changed. | -1 | -2 | -3 | -4 | -5 | 22. |

KEY PUNCH
USE ONLY

CIRCLE ONE ANSWER

- | | | | | | | |
|--|----|----|----|----|----|-----|
| 10. I am kept well informed about plans and developments in the unit. | -1 | -2 | -3 | -4 | -5 | 23. |
| 11. Decisions which affect me are explained. | -1 | -2 | -3 | -4 | -5 | 24. |
| 12. Communication <u>up</u> the chain of command is accurate and adequate. | -1 | -2 | -3 | -4 | -5 | 25. |
| 13. Communication <u>down</u> the chain of command is accurate and adequate. | -1 | -2 | -3 | -4 | -5 | 26. |
| 14. I feel free to talk openly with my immediate supervisor. | -1 | -2 | -3 | -4 | -5 | 27. |
| 15. I understand the unit's discipline procedures. | -1 | -2 | -3 | -4 | -5 | 28. |

CIRCLE ONE ANSWER

1. To a very little extent
2. To a little extent
3. To some extent
4. To a great extent
5. To a very great extent

COMMUNICATION

(NOTICE: CHANGE OF SCALE)

To what extent do you understand each of the following:

- | | | | | | | |
|---|----|----|----|----|----|-----|
| 16. Retirement benefits | -1 | -2 | -3 | -4 | -5 | 29. |
| 17. Promotion opportunities | -1 | -2 | -3 | -4 | -5 | 30. |
| 18. Post Exchange privileges | -1 | -2 | -3 | -4 | -5 | 31. |
| 19. VA housing insurance benefits | -1 | -2 | -3 | -4 | -5 | 32. |
| 20. Military space available flights | -1 | -2 | -3 | -4 | -5 | 33. |
| 21. Available military correspondence courses | -1 | -2 | -3 | -4 | -5 | 34. |
| 22. Available military job training | -1 | -2 | -3 | -4 | -5 | 35. |
| 23. GI Life Insurance | -1 | -2 | -3 | -4 | -5 | 36. |
| 24. Personal responsibilities in the unit | -1 | -2 | -3 | -4 | -5 | 37. |

| | | | | | KEY PUNCH USE ONLY |
|--|----|----|----|-------|-----------------------|
| <u>CIRCLE ONE ANSWER</u> | | | | | |
| 25. Pay procedures | -1 | -2 | -3 | -4 -5 | 38. |
| 26. Civilian employment protection | -1 | -2 | -3 | -4 -5 | 39. |
| 27. MOS testing and qualification | -1 | -2 | -3 | -4 -5 | 40. |
| 28. Reserve Buying System | -1 | -2 | -3 | -4 -5 | 41. |
| LEADERSHIP SKILLS | | | | | |
| (NOTICE: CHANGE OF SCALE) | | | | | |
| 1. Strongly disagree 2. Somewhat disagree 3. Undecided 4. Somewhat agree 5. Strongly agree | | | | | |
| <u>CIRCLE ONE ANSWER</u> | | | | | |
| 29. My immediate supervisor does not pass the buck. | -1 | -2 | -3 | -4 -5 | 42. |
| 30. My immediate supervisor lives up to his or her promises. | -1 | -2 | -3 | -4 -5 | 43. |
| 31. My immediate supervisor listens to what I say. | -1 | -2 | -3 | -4 -5 | 44. |
| 32. My immediate supervisor does a good job of representing me and my interests. | -1 | -2 | -3 | -4 -5 | 45. |
| 33. I am criticized only when I deserve it. | -1 | -2 | -3 | -4 -5 | 46. |
| 34. The orders I get are clear, concise, and not contradicted. | -1 | -2 | -3 | -4 -5 | 47. |
| 35. My immediate supervisor finds the answers to difficult work problems. | -1 | -2 | -3 | -4 -5 | 48. |
| 36. I respect my commander as a leader. | -1 | -2 | -3 | -4 -5 | 49. |
| 37. I respect my junior officers as leaders. | -1 | -2 | -3 | -4 -5 | 50. |
| 38. I respect my unit NCO's as leaders. | -1 | -2 | -3 | -4 -5 | 51. |
| 39. My commander understands unit problems. | -1 | -2 | -3 | -4 -5 | 52. |
| 40. My commander encourages me to do my best. | -1 | -2 | -3 | -4 -5 | 53. |

CIRCLE ONE ANSWER

1. Strongly disagree
2. Somewhat disagree
3. Undecided
4. Somewhat agree
5. Strongly agree

TREATMENT OF SUBORDINATES

- | | | | | | | |
|--|----|----|----|----|----|-----|
| 41. When I make a suggestion that is not acceptable, I am told the reason why. | -1 | -2 | -3 | -4 | -5 | 54. |
| 42. Unit inspections are reasonable and consistent. | -1 | -2 | -3 | -4 | -5 | 55. |
| 43. Haircut policy is fairly and uniformly enforced. | -1 | -2 | -3 | -4 | -5 | 56. |
| 44. I seldom have to hurry up and wait. | -1 | -2 | -3 | -4 | -5 | 57. |
| 45. Promotions are made fairly. | -1 | -2 | -3 | -4 | -5 | 58. |

WORK GROUP PROCESS

- | | | | | | | |
|---|----|----|----|----|----|-----|
| 46. I am encouraged to make suggestions to improve job methods and work conditions. | -1 | -2 | -3 | -4 | -5 | 59. |
| 47. My section works together as a team. | -1 | -2 | -3 | -4 | -5 | 60. |
| 48. I feel a responsibility for accomplishing my unit's goals. | -1 | -2 | -3 | -4 | -5 | 61. |

TRAINING

- | | | | | | | |
|---|----|----|----|----|----|-----|
| 49. I am offered sufficient training to advance in my MOS. | -1 | -2 | -3 | -4 | -5 | 62. |
| 50. Classroom instruction at regular drills is well prepared and presented. | -1 | -2 | -3 | -4 | -5 | 63. |
| 51. Annual Training at summer camp is well prepared and presented. | -1 | -2 | -3 | -4 | -5 | 64. |
| 52. Company field training is well prepared and presented. | -1 | -2 | -3 | -4 | -5 | 65. |
| 53. Classroom instruction at regular drills is useful. | -1 | -2 | -3 | -4 | -5 | 66. |
| 54. Annual Training at summer camp is useful. | -1 | -2 | -3 | -4 | -5 | 67. |

| | | | | | | |
|--|----|----|----|----|----|-----|
| 55. My military job training has given me skills which will be useful in the future. | -1 | -2 | -3 | -4 | -5 | 68. |
| 56. I feel knowledgeable in my MOS. | -1 | -2 | -3 | -4 | -5 | 69. |
| 57. I understand my unit's mission. | -1 | -2 | -3 | -4 | -5 | 70. |

CIRCLE ONE ANSWER

1. To a very little extent
2. To a little extent
3. To some extent
4. To a great extent
5. To a very great extent

PLANNING AND ORGANIZATION

(NOTICE: CHANGE OF SCALE)

To what extent:

| | | | | | | |
|---|----|----|----|----|----|-----|
| 58. Does your unit critique its experiences as a basis for learning? | -1 | -2 | -3 | -4 | -5 | 71. |
| 59. Do you understand what is expected of you? | -1 | -2 | -3 | -4 | -5 | 72. |
| 60. Does your immediate supervisor have your work well organized? | -1 | -2 | -3 | -4 | -5 | 73. |
| 61. Does your immediate supervisor establish objectives and plans to meet them? | -1 | -2 | -3 | -4 | -5 | 74. |
| 62. Do you establish personal job goals and plans to meet them? | -1 | -2 | -3 | -4 | -5 | 75. |
| 63. Is mission accomplishment emphasized? | -1 | -2 | -3 | -4 | -5 | 76. |
| 64. Would you describe the decision making process and problem solving methods in your unit as rational and systematic? | -1 | -2 | -3 | -4 | -5 | 77. |

CIRCLE ONE ANSWER

1. Very unimportant
2. Unimportant
3. Neutral
4. Important
5. Very Important

RECRUITING AND RETENTION

(NOTICE: CHANGE OF SCALE)

How important to you are each of the following in making a decision to remain in the Army Reserve?

| | | | | | | |
|---|----|----|----|----|----|-----|
| 65. Promotion | -1 | -2 | -3 | -4 | -5 | 78. |
| 66. Pay, allowance, and insurance | -1 | -2 | -3 | -4 | -5 | 79. |
| 67. Knowing I play a part in the defense of the country | -1 | -2 | -3 | -4 | -5 | 80. |
| 68. Enjoyment of serving in the unit | -1 | -2 | -3 | -4 | -5 | 5. |
| 69. Retirement benefits | -1 | -2 | -3 | -4 | -5 | 6. |
| 70. Personal friendships | -1 | -2 | -3 | -4 | -5 | 7. |
| 71. Broadened social and business contacts | -1 | -2 | -3 | -4 | -5 | 8. |
| 72. Training opportunities | -1 | -2 | -3 | -4 | -5 | 9. |
| 73. Pride in membership in the Army Reserve | -1 | -2 | -3 | -4 | -5 | 10. |
| 74. Service to the community | -1 | -2 | -3 | -4 | -5 | 11. |
| 75. Opportunities to use my training and abilities. | -1 | -2 | -3 | -4 | -5 | 12. |

How important were each of the following in your decision to join the Army Reserve?

| | | | | | | |
|-----------------------------------|----|----|----|----|----|-----|
| 76. Avoiding the draft | -1 | -2 | -3 | -4 | -5 | 13. |
| 77. Earning extra money | -1 | -2 | -3 | -4 | -5 | 14. |
| 78. Gaining job training | -1 | -2 | -3 | -4 | -5 | 15. |
| 79. Being with friends who joined | -1 | -2 | -3 | -4 | -5 | 16. |
| 80. Serving my country | -1 | -2 | -3 | -4 | -5 | 17. |

| | <u>CIRCLE ONE ANSWER</u> | | | | | KEY PUNCH USE ONLY |
|---|--------------------------|----|----|----|----|-----------------------|
| 81. Which statement best describes the action of your friends concerning your reenlistment? 1) They strongly discourage me. 2) They discourage me. 3) They are neutral. 4) They encourage me. 5) They strongly encourage me. | -1 | -2 | -3 | -4 | -5 | 18. |
| 82. Which statement best describes the action of your <u>family</u> concerning your reenlistment? 1) They strongly discourage me. 2) They discourage me. 3) They are neutral. 4) They encourage me. 5) They strongly encourage me. | -1 | -2 | -3 | -4 | -5 | 19. |
| 83. How frequently have you been interviewed by someone in the chain of command and encouraged to continue in the Reserve program? 1) Never 2) Once during my enlistment 3) Less than once a year 4) Once each year 5) More than once a year | -1 | -2 | -3 | -4 | -5 | 20. |
| DEVELOPMENT | | | | | | |
| 84. How frequently do you receive performance evaluations from your supervisor? 1) Never 2) Once during my enlistment 3) Less than once a year 4) Once each year 5) More than once each year | -1 | -2 | -3 | -4 | -5 | 21. |
| 85. How frequently do you and your supervisor set career objectives for your military career, and plans to meet them? 1) Never 2) Once during my enlistment 3) Less than once a year 4) Once each year 5) More than once a year | -1 | -2 | -3 | -4 | -5 | 22. |

KEY PUNCH
USE ONLY

CIRCLE ONE ANSWER

1. Strongly disagree
2. Somewhat disagree
3. Undecided
4. Somewhat agree
5. Strongly agree

(NOTICE: CHANGE OF SCALE)

86. My performance evaluations are constructive.

-1 -2 -3 -4 -5

23.

87. My commander is concerned about my welfare and progress.

-1 -2 -3 -4 -5

24.

CIRCLE ONE ANSWER

1. To a very little extent
2. To a little extent
3. To some extent
4. To a great extent
5. To a very great extent

OTHER

(NOTICE: CHANGE OF SCALE)

To what extent:

88. Does your supply room provide you with adequate supplies and services?

-1 -2 -3 -4 -5

25.

89. Do you have the parts, tools, materials, & equipment to do your job?

-1 -2 -3 -4 -5

26.

90. Do you feel you are prepared for a call to active duty?

-1 -2 -3 -4 -5

27.

91. Do you feel your unit is one of the better units in ARCOM?

-1 -2 -3 -4 -5

28.

92. Are you satisfied that your administrative needs (pay, records, orders) are well taken care of?

-1 -2 -3 -4 -5

29.

TREND DATA

(NOTICE: CHANGE OF SCALE)

Past to Present

In my opinion, since I joined this unit:

- | | <u>CIRCLE ONE ANSWER</u> | | | | | KEY PUNCH
USE ONLY |
|-------------------------------------|--------------------------|----------------|-------------------|-------------------|---------------|-----------------------|
| | 1. | 2. | 3. | 4. | 5. | |
| | Much worse | Somewhat worse | Remained the same | Somewhat improved | Much improved | |
| 93. Mission readiness has: | -1 | -2 | -3 | -4 | -5 | 30. |
| 94. Supervision has: | -1 | -2 | -3 | -4 | -5 | 31. |
| 95. Training has: | -1 | -2 | -3 | -4 | -5 | 32. |
| 96. Communications have: | -1 | -2 | -3 | -4 | -5 | 33. |
| 97. Planning and organization have: | -1 | -2 | -3 | -4 | -5 | 34. |

Present to Future

As I anticipate the future of the unit, I believe:

- | | | | | | | |
|---|----|----|----|----|----|-----|
| 98. Unit mission readiness will be: | -1 | -2 | -3 | -4 | -5 | 35. |
| 99. Supervision will be: | -1 | -2 | -3 | -4 | -5 | 36. |
| 100. Communications will be: | -1 | -2 | -3 | -4 | -5 | 37. |
| 101. Training will be: | -1 | -2 | -3 | -4 | -5 | 38. |
| 102. Planning and Organization will be: | -1 | -2 | -3 | -4 | -5 | 39. |

STOP

YOU HAVE COMPLETED THE SURVEY - CHECK TO SEE THAT YOU HAVE ANSWERED ALL OF THE QUESTIONS. THEN TURN IN THE SURVEY TO THE SURVEY CONTROL OFFICER. THANK YOU FOR TAKING THE SURVEY - YOUR COOPERATION IS APPRECIATED.

SOURCES AND RESOURCES

SOURCES AND RESOURCES

This section of the OE COMMUNIQUE is designed to provide current information about resource materials of interest to the practicing OESO. The article in this Issue deals with sources of information relating to the use of instruments and gives order information for the commercially produced instruments currently in use at OETC.

Meanwhile work goes on at the OETC Library and Learning Center in the compilation of our magnum opus: the OESO RESOURCE BOOK. It will include a revised "Basic Reference Collection for the OESO" as well as updated lists of book and audiovisual resources in our collection, arranged by subject. Plans are to publish it as an OETC Reference Book with a projected availability date of September or October 1978. It will be sent out on the same distribution as the OE COMMUNIQUE.

In order for information in the future issues of the OE COMMUNIQUE to be responsive to YOUR needs, feedback from the field is essential.

PLEASE WRITE !!

Lynn
Librarian, OETC

INSTRUMENTS, CARE AND FEEDING OF

Most people who participate in training programs offered by OETC receive some exposure to instruments. The feedback information provided by the analysis of instrumentation results is frequently helpful in increasing self awareness in areas as diverse as favored learning styles and leadership techniques. Many OESOs in the field have also found selected instruments to be useful in OE operations. A potentially greater number of OESOs have had occasion to use instruments but have not done so because the instruments were not available at the time. If you fall into the latter category, now's the time to do a little OMR planning.

If your desired outcome is to be able to use a range of instruments in the various stages of OE operations, this article may be helpful in your development of methods to achieve that outcome. The resources involved are your time and (hopefully) some end of year funds.

Fordyce & Weil's now classic OD book MANAGING WITH PEOPLE: A MANAGER'S HANDBOOK OF ORGANIZATION DEVELOPMENT METHODS (Addison-Wesley, c1971) includes a brief summary of the use of instruments in the section "Methods For Finding Out What Is Going ON." It differentiates between a questionnaire and an instrument in the following way: "The instrument as used in organizational development is similar to the questionnaire, with the important addition that it is constructed around a theory of management in such a manner as to help the user understand the theory and rate himself or his organization in terms of that theory." (p. 138) There is additional information on polling a group by means of rating the status of various elements on a continuum.

The workbook AN EXPERIENTIAL APPROACH TO ORGANIZATION DEVELOPMENT by Harvey and Brown (Prentice-Hall, c1976) includes a number of sample surveys, some of which use the continuum as a rating scale. PEOPLE AT WORK: A PRACTICAL GUIDE TO ORGANIZATIONAL CHANGE by Francis and Woodcock (University Associates, c1974) is also a source of survey type "instruments" which may be useful in OE operations. The first section of the book describes various blockages commonly found in organizations. References are given to brief questionnaires and checklists in the second section which can be used to deal with correcting identified blockages. All materials may be reproduced locally.

OETC does not currently use instruments based on Blake and Mouton's "Managerial Grid," but OESOs in the field may find it useful to understand the organizational theory behind that grid. Most text books on management include portions on the Managerial Grid and there's a book in the Addison-Wesley OD series which ties it directly to OD: BUILDING A DYNAMIC CORPORATION THROUGH GRID ORGANIZATION DEVELOPMENT (Addison-Wesley, c1969). Blake and Mouton collaborated with COL E. Dale Bryson to develop "The Military Leadership Grid," printed in the June 1968 issue of the MILITARY REVIEW. Reprints of the article are available from Scientific Methods Incorporated, Box 195, Austin, TX 78767.

The University Associates REFERENCE GUIDE TO HANDBOOKS AND ANNUALS gives a brief introduction to the use of instruments (pp. 75-83 in the second edition) and also lists instruments that have been included in UA ANNUALS and HANDBOOKS. Remember that the REFERENCE GUIDE does not cover the 1978 ANNUAL, so check that ANNUAL for additional instruments. (Richard Christie's MACH V ATTITUDE INVENTORY from the 1978 ANNUAL has been used in several OETC training sessions.) Instruments printed in University Associates publications may be locally reproduced for educational and training purposes unless they are otherwise copyrighted. See the front of an ANNUAL or HANDBOOK for the wording of the credit statement to be included on reproduced materials.

University Associates also publishes an invaluable resource book which deals with the use and sources of a number of commercially produced instruments. INSTRUMENTATION IN HUMAN RELATIONS TRAINING, edited by Pfeiffer, Heslin and Jones, is in its second edition and provides general guidelines for choosing and using instruments as well as specific information on each of 92 selected instruments. The practical philosophy presented in the general section is designed to increase the practitioner's understanding of uses and abuses of instruments. It is an excellent "refresher course" and will probably provide welcome reassurance to first-time instrument users. As an added bonus, chapter two is particularly useful in preparing to administer the ever-popular FIRO-B. Chapter four provides guidance in the development of instruments locally to meet needs not covered by standard instruments.

Instruments can be ordered by OESOs in the same way books are ordered. See the "Sources and Resources" section of the April 1978 OE COMMUNIQUE for info on ordering books. Full order information would be the exact title of the instrument and any desired accompanying material (FIRO-F will not be the same as FIRO-B), quantity needed, price, and source with complete address. All of that information is given in UA's book on instrumentation, but prices can be expected to be higher. A way of avoiding delays at the local Procurement Office caused by increased prices is to get a telephone quote from the vendor before ordering. But be extra careful not to give the vendor the idea that you are actually placing an order, which is a giant NO-NO!

The following list is of commercially produced instruments currently used in OETC training activities. Sources are given, but prices are not. Prices for large quantities are usually less than for smaller quantities, but a bargain is only a bargain if it's eventually used. If you are in doubt about the extent to which a specific instrument will be used, and if time is not a critical factor, it makes sense to order a specimen set for each instrument. Specimen sets usually include sample instrument(s), scoring sheets if separate, and a manual with instructions for administering and interpreting the instrument. Nothing is more infuriating than receiving a long-awaited shipment of instruments only to discover that it is useless without the scoring sheets, which must be ordered separately!

Instrument: AS I SEE IT

Developed By: George Trueell, based on theories of Abraham Maslow

Orientation: Deals with needs on a personal and an organizational level.

Source: George Trueell Associates
495 North Forest Road
Williamsville, NY 14221
Tel: (716) 634-3491

Instrument: FIRO-B

Developed By: Will Schutz

Orientation: Measurement of expressed and desired inclusion, control and affection

Source: Consulting Psychologist Press
577 College Avenue
Palo Alto, CA 94032
Tel: (415) 326-4448

Additional info: INSTRUMENTATION IN HUMAN RELATIONS TRAINING, edited by Pfeiffer, Heslin and Jones (University Associates, c1976)

THE INTERPERSONAL UNDERWORLD, by Will Schutz (Science & Behavior Books, 1966)

ELEMENTS OF ENCOUNTER, by Will Schutz (Joy Press, c1973)

Instruments: LEAD SELF and LEAD OTHER

Developed by: Paul Hersey and Kenneth H. Blanchard

Orientation: Indication of applied leadership style. (LEAD is an acronym for Leader Effectiveness & Adaptability Description.)

Source: NTL/Learning Resources Corporation
7594 Eads Avenue
La Jolla, CA 92037
Tel: (714) 566-7710

Additional info: THE 1976 ANNUAL HANDBOOK FOR GROUP FACILITATORS, pp. 87-99 (University Associates, c1976)

MANAGEMENT OF ORGANIZATIONAL BEHAVIOR, 3rd edition, by Hersey & Blanchard (Prentice-Hall, c1977)

Instrument: LEARNING STYLE INVENTORY (LSI)

Orientation: Assessment of favored method(s) of learning

Source: Available in ORGANIZATIONAL PSYCHOLOGY;: AN EXPERIENTIAL APPROACH, 2nd Edition, by Kolb, Rubin and McIntyre (Prentice-Hall, c1974). Permission to reproduce must be obtained from publisher.

Instruments: MATURITY SCALE MANAGER RATING FORM and MATURITY SCALE SELF-RATING FORM

Developed By: Ronald K. Hambleton, Kenneth H. Blanchard and Paul Hersey

Orientation: Indication of willingness and ability to assume task-related job responsibility

Source: NTL/Learning Resources Corporation
7594 Eads Avenue
La Jolla, CA 92037
Tel: (714) 566-7710

Instrument: STRENGTH DEPLOYMENT INVENTORY (SDI)

Developed by: Elias H. Porter

Orientation: Concerned with an individual's behavior patterns in conflict and non-conflict situations

Source: Personal Strength Assessment Service
P.O. Drawer 379, 571 Muskigum Avenue
Pacific Palisades, CA 90272
Tel: (213) 454-0223

Instrument: VALUE SURVEY (Form D)

Developed by: Milton Rokeach

Orientation: Relative importance placed by the individual on selected values

Source: Halgren Tests
873 Persimmon Avenue
Sunnyvale, CA 94087

AWARDED 5Z BY ALTERNATE PROCEDURES

LTC FRANK BURNS

HQ DA Office of the Chief of Staff
Management Directorate, Office of OE
Pentagon Room 1A 869
Washington, DC 20310

LTC THOMAS S. MYERCHIN

HQ, 1st Bde, 2d Inf Div
APO San Francisco, CA 96224

LTC RAMON NADAL

USA War College, Class 78
Carlisle Barracks, PA 17013

LTC ROY RAY

82d Airborne Div
Ft Bragg, NC 28307

MAJ FRED W. SCHAUM

HQ DA Office of the Chief of Staff
Room 3D 640 Pentagon
Washington, DC 20310

Former OETC Staff Member (5Z)

LTC RICHARD A. ROBINSON, JR.

HQ, 9th Inf Div and Ft Lewis
ATTN: DPCA-OE
Fort Lewis, WA 98499

The following papers were presented at OD 78 and are available for loan from the OETC Library.

Conference co-sponsors:

University Associates, Inc.
University Associates of Canada, Inc.
NTL/Learning Resources Corp.
Griffin Communications, LTD.

| <u>Presenter</u> | <u>Topic</u> |
|---|--|
| John D. Adams PhD Leland Bradford PhD Stanley Davis PhD | Improving Stress Management Retirement and OD Matrix: Filling the Gap Between Theory and Practice |
| Philip B. Daniels William G. Dyer | Consulting by Tape |
| Gerald Egan PhD | The Logic of Systems as OD Instrument |
| Len Goldstein PhD | OD in Bureaucracies |
| Kenneth Blanchard PhD Paul Hersey PhD | Situational Leadership |
| Jack Sherwood PhD Donald King PhD Michael Manning | OD's Research Base: How to Expand and Utilize it. |
| George Litwin PhD John Humphrey Tom Wilson | Organizational Climate: A Proven Tool for Improving Performance. |
| Mewton Marguiles PhD | Prospectives on the Marginality of the Consultant's Role |
| David Madler PhD | Consulting to Labor and Manage- ment |
| John Jones PhD William Pfeiffer PhD | OD Readiness |
| Edgar Shein PhD | Human Resource Planning and Development |
| Moel Tichy PhD | Demise, Absorption or Renewal for the Future of OD |

| <u>Presenter</u> | <u>Topic</u> |
|----------------------------|---|
| Marv Weisbord | Input vs Output Organizations or Why OD Works - Sometimes |
| Robert T. Golembiewski PhD | Managing the Tension Between OD Principles and Political Dynamics |
| Jack R. Gibb PhD | Improving Organizational Effec- tiveness Through Focus Upon Environmental Quality |
| Stanley M. Herman PhD | Trans Concept Development: An Introduction. |

ROSTERS

UNITED STATES ARMY
ORGANIZATIONAL EFFECTIVENESS TRAINING CENTER
STAFF AND FACULTY

| <u>NAME</u> | <u>RANK</u> | <u>OFFICE</u> |
|---------------------------|-------------|------------------------|
| PALMER, GEORGE E. | COL | Commander |
| BRADFORD, WILLIAM B. | LTC | Training Directorate |
| BROWN, ROBERT W. | LTC | Training Developments |
| DENZLER, ANCIL L. | LTC | Training Directorate |
| FISHER, WILLIAM R. | LTC | Training Directorate |
| JONES, OTIS D. | LTC | Evaluation Directorate |
| LIBBY, BILLY W. | LTC | Training Directorate |
| LOORAM, JAMES F. | LTC | Training Directorate |
| MACK, OSCAR C. | LTC | Evaluation Directorate |
| PIKE, GERALD D. | LTC | Concepts Development |
| VAN EYNDE, DONALD F. | LTC | Training Directorate |
| WATT, JOSEPH F. | LTC | Opns & Spt Directorate |
| KAHN, OTTO | GS-14 | ARI Liaison Officer |
| GUIDO, LAWRENCE C. | GS-13 | Training Directorate |
| SAVARD, DAVID A. | GS-13 | Evaluation Directorate |
| SPEHN, MEL R. | GS-13 | Training Developments |
| BURNS, KENNITH R. | MAJ | Training Directorate |
| COKE, ALFRED M. | MAJ | Training Directorate |
| COOPER, FRED D. | MAJ | Evaluation Directorate |
| DULIN, STANLEY L. | MAJ | Training Directorate |
| FAHEY, THOMAS E. | MAJ | Training Directorate |
| JAMES, CARL A. | MAJ | Concepts Development |
| MIKOLS, WALTER V., JR. | MAJ | Training Directorate |
| O'BRIEN, ANDREW J. | MAJ | Training Directorate |
| OMPHROY, RAYMOND A. | MAJ | Training Directorate |
| RITTER, JAMES W. | MAJ | Concepts Development |
| ROCK, PAUL J. | MAJ | Training Developments |
| SAWCZYN, WILLIAM | MAJ | Concepts Development |
| WHITE, RICHARD | MAJ | Concepts Development |
| DITSLER, DALE E. | GS-12 | Concepts Developments |
| EPPLER, JERRY M. | GS-12 | Training Directorate |
| FERRIER, STEVEN | GS-12 | Training Developments |
| GALLATIN-JAMES, SHARON K. | GS-12 | Training Developments |
| GOODFELLOW, ROBERT | GS-12 | Training Directorate |
| MAROVICH, MICHAEL | GS-12 | Training Directorate |
| MCDUFFY, CLIFFORD | GS-12 | Training Directorate |
| ZACKRISON, RICHARD E. | GS-12 | Training Directorate |

| <u>NAME</u> | <u>RANK</u> | <u>OFFICE</u> |
|-------------------------|-------------|------------------------|
| ARMOUR, WAYNE T. | CPT | Opns & Spt Directorate |
| BEST, PAUL R., JR. | CPT | Evaluation Directorate |
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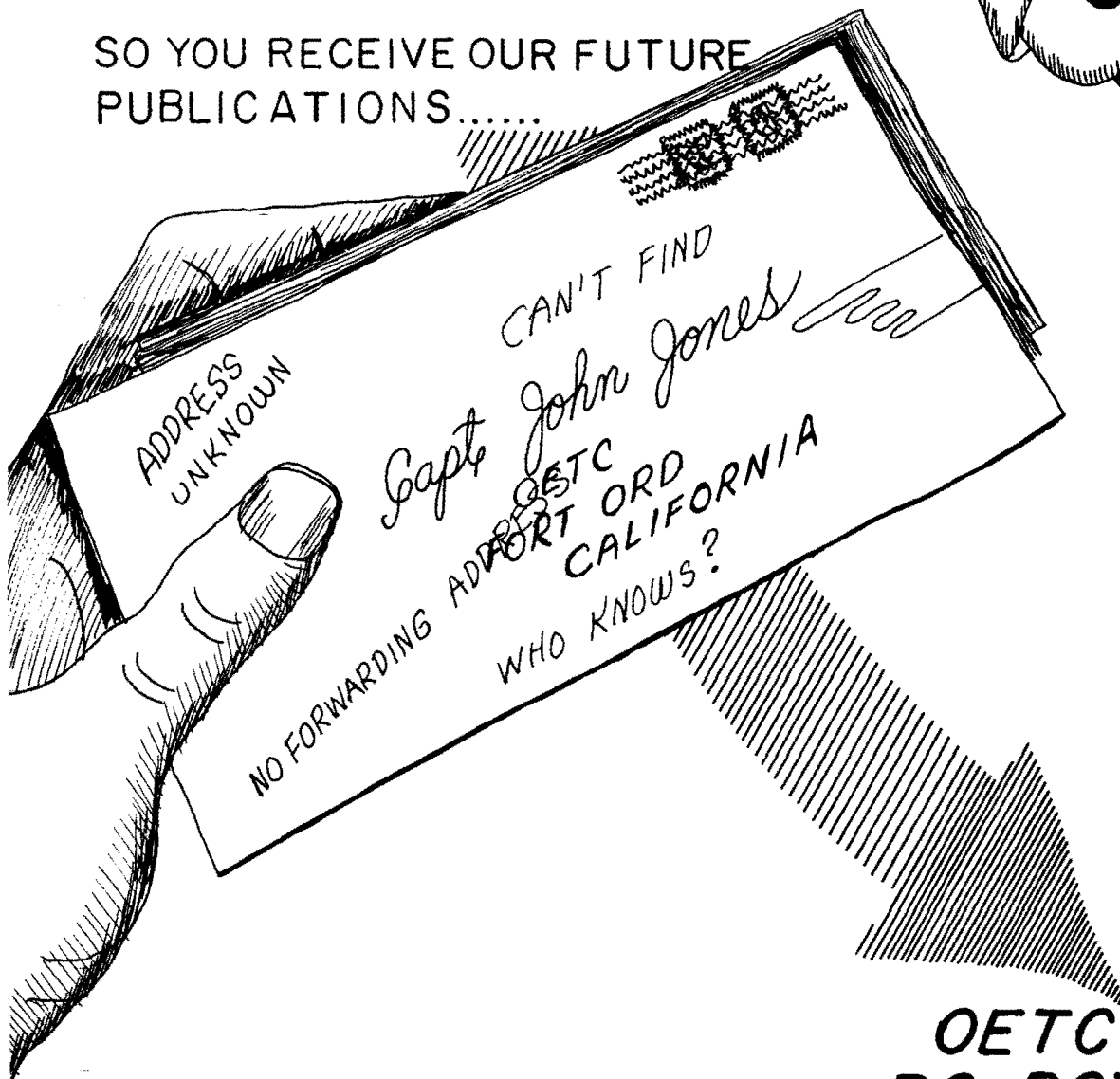
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A DESCRIPTION OF THE FOUR-STEP PROCESS

Organizational effectiveness is a four-phased process which seeks to improve the functioning of an organization, or unit, through planned, systematic, long-range efforts by applying selected management and behavioral science skills and methods to the total organization. The four steps are:

Assessment. The OESO has been trained to make assessments by using several different methods. They may include observation, interviews, group interviews, questionnaires, surveys, or a combination of all of these methods. The OESO tailors the assessment technique to gather data based on the concerns of the commander. Once the information has been gathered, it is fed back to the commander. This is what you asked me to look at, and here is what I found. In addition, I found these other items that may be of interest to you. The objective of the assessment is to set the gap; i.e., determine where the commander wants the unit to be in the future (changes he desires) and find out where it is now.

Chain of Command Action Planning. Based on the assessment, the commander and the OESO work together to plan what actions should be taken to resolve or reduce problem areas. Sometimes these actions may be solely the commander's. Other times it may involve the OESO as a workshop or meeting facilitator. In every case, the commander decides what is to be done. Once the "what to do" issues are resolved, they attack the "how to" problems: If a 2-day workshop for company commanders and battalion staff officers is agreed on, when can the time be afforded for it?

Implementation. As a result of this planning, the commander initiates those actions that will produce the changes desired. They might be nothing more than a change in office arrangements or training or living facilities, or they may include such things as a workshop on developing/improving problem solving techniques, communication skills, counseling skills, techniques for conducting more productive meetings, etc. OESOs are also trained to facilitate team building and transition of command workshops.

Evaluation/Follow-up. The evaluation that follows an OE operation is not for the purpose of evaluating the unit. It is oriented toward evaluating the effects, good or bad, of the previous efforts. The follow-up portion of this phase addresses appropriate corrective action to rectify something that either happened or failed to happen due to the previous three steps. Follow-up may well lead into a new assessment, thereby making the OE process continuous and long term, as well as systematic.

Because Organizational Effectiveness is an ongoing process, it should not be looked at as a one-shot, quick fix solution to organizational problems. Each step in the process is taken individually and utilized ultimately to improve the total organization in its day to day operations which results in improved readiness.

THE FOUR STEP ORGANIZATIONAL EFFECTIVENESS PROCESS

