OE COMMUNIQUÉ

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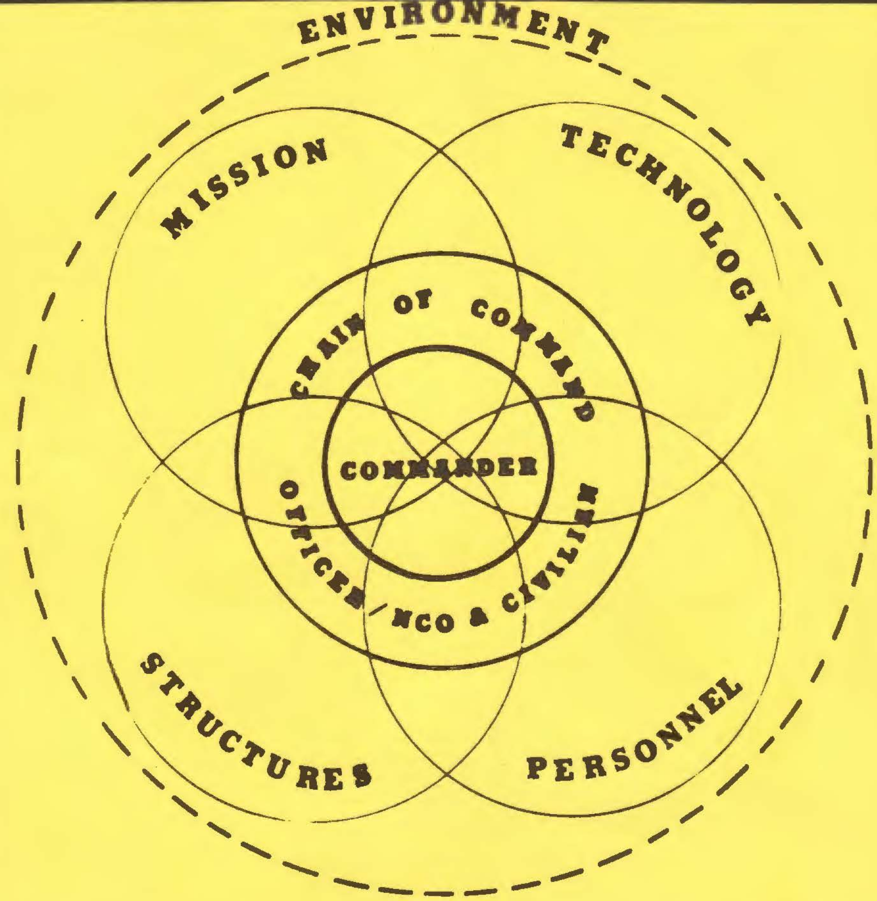

THE ORGANIZATIONAL EFFECTIVENESS VIEW OF THE TOTAL ORGANIZATION

U.S. ARMY TRAINING AND DOCTRINE COMMAND

ORGANIZATIONAL EFFECTIVENESS TRAINING CENTER

FORT ORD, CALIFORNIA

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. Is 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.

Submission date for articles for the next issue of the COMMUNIQUE is 15 December 1978. All articles submitted for publication in the COMMUNIQUE should be mailed to:

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

OE COMMUNIQUE October 1978

CONTENTS

COMMANDER'S COMMENTS

This publication, our fifth edition of the OE COMMUNIQUE, continues Colonel Palmer's initiative to publish a pragmatic document that will assist the OESO in his or her job. As many of you already know, Colonel Palmer retired on 1 September after thirty-three years of service. His tour here as Commander saw OETC restore its military image. His tireless and effective effort to promote the credibility of OE in the Army contributed significantly to the maturity of what is now a KEY Army program. Colonel Joseph C. Lutz will assume command of OETC after completion of his current command tour with 3d Armored Cavalry Regiment, Fort Bliss, Texas.

To accomplish the first objective of the Communique in keeping the OESO and Key Managers informed of the activities at OETC, I have asked each of the Directors to select highlights of the past quarter and significant events of the upcoming quarter. These summaries will comprise the bulk of the Commander's comments. They will also include the point of contact at OETC for more information and for feedback for those in the field. The second objective of the COMMUNIQUE, publishing stimulating articles and usable workshops, is accomplished in the series of articles sent in by a variety of contributors - I encourage <u>all</u> to contribute. We will make every effort to publish all contributions. Our third objective in publishing the COMMUNIQUE was to provide a vehicle for input and feedback. I would like to get your feedback and your input!

I would like to correct some erroneous information that appears in the July COMMUNIQUE. In discussing the OENCO program in that issue we stated that the stabilization tour for OENCO's was 36 months. That should read 12 months. Also, at the bottom of page 70 in the July issue, change the point of contact from LTC Wolfe to CPT Lorbeer and the phone number to 221-8697. We apologize for any confusion or inconvenience that this may have caused in the field.

I would also like to draw your attention to the Roster section of this issue. You will note that we have included telephone numbers for those individuals listed on the OETC Staff Directory. This is in response to a request from the field.

In closing, I would like to mention that this is the last issue of the COMMUNIQUE for calendar year 1978. We're looking forward to continuing in 1979 and to beginning afresh with issues that meet your needs and provide the practitioner as well as the interested spectator with useful information. To do this we need your input, your feedback. Suggestions or comments on the size, contents, color, frequency of publication or any other idea that comes to mind, would be greatly appreciated. Let us hear from you.

LTC Denzler

ARMY-WIDE OE UPDATE

TRAINING DEVELOPMENTS DIRECTORATE

LEADERSHIP AND MANAGEMENT DEVELOPMENT COURSE REVISION:

The current Leadership and Management Development Course (L&MDC) was revised at a conference held at OETC during the week of 14-18 August 1978. Representatives were present from OETC, TRADOC and FORSCOM. A critical look was taken at L&MDC including its history, where we currently are with it and where we would like it to go. The L&MDC, as revised, will be ready for publication the second week in October and should be in the field by the end of November.

The L&MDC was updated and the exercises were militarized.

Revisions to the course include:

1. A section on reaching course goals.

2. A bibliography of L&MDC materials available from the OETC library.

3. Trainers notes emphasizing the practical home-unit applications of the skills taught.

4. Trainers' notes emphasizing job performance counseling and the mission-oriented motivation behind all military counseling.

5. Guidance to be given to students as to when and when not to use awareness skills in military situations.

6. Trainers' notes emphasizing the importance of the student functioning as an adult active learner rather than as a passive student receiving teachings.

7. An expanded unit on OE and Systems Theory.

8. Increased emphasis on the appropriateness of situational leadership styles.

9. Notes on the usefulness of keeping the L&MDC daily journal.

10. Matching the L&MD skills with the goals of the Army.

11. Replacing the consensus exercise with a militarized unit on teamwork.

12. Increased emphasis on problem solving techniques.

13. The addition of a unit on goal setting and action planning using OMR model on a problem which the student faces in his own unit.

14. Simplification of the behavioral science readings.

15. Increased focusing on self-reliance within intrapersonal dynamics.

16. Increased emphasis on constructive competition.

POC: Dr. Stephen Ferrier - Autovon 929-7058.

SERVICE SCHOOL MODULE REVISION:

A conference was held at OETC on 21 August 1978 to review the Basic NCOES, Advanced NCO, Basic Officer and Advanced Officer Service School Modules and make changes as required in the content and learning objectives. In addition to OETC staff and faculty, representatives from the Infantry School, Fort Benning; Armor School, Fort Knox; Artillery School, Fort Sill; Signal School, Fort Gordon; also attended. These schools have the most experience in presenting the modules.

The conferees developed 46 changes, mostly cosmetic, involving dejargonization or standards-tightening and the alignment of the modules with the most current OE doctrine. The results of the conference have been released to HQ TRADOC with a request for a quick release to the field.

POC: LTC Robert Brown or SFC Richard Hines - Autovon 929-7058.

COMMANDER'S GUIDE TO OE:

A major milestone has been met in the effort to have the Commander's Guide published as a training circular and distributed Army-wide. The latest word is that it has been released to the printer for printing and distribution. The sequence of events to come is as follows:

1. The printer is required to begin shipment of the publication to AG Publications, Baltimore, MD by 13 Nov 78.

2. Advance copies should begin arriving by 30 Nov 78 to those TRADOC service schools that made their FY 79 requirements known to OETC back in June of this year.

3. Pinpoint distribution to the field should be completed 90-120 days after Baltimore receives the publication from the printer.

Pinpoint distribution will be made to those organizations who have established their requirements via DA Form 12-11A. The quantity required block No. 180, Requirement for Military Leadership, DA Form 12-11A will be scanned by the AG with those units who have previously established requirements for other literature that falls into this block, e.g., FM 22-100. Those units will receive TC 26-1, Commander's Guide to Organizational Effectiveness, via pinpoint distribution. Other organizations will have to submit requisitions for the "Guide."

The response from the field for the "Guide" has been overwhelming. Close to 13,000 copies have been distributed by OETC as a courtesy, advance copies to the field. OETC is not staffed or funded to sustain this kind of activity which is why actions were begun in June to place the "Guide" into the Army's literature distribution. When the few copies remaining at OETC have been distributed the school will be out of that end of the business. As was mentioned earlier, the time is nearly at hand for the AG to begin responding to the demands from the field for the Commander's Guide to OE.

POC: MAJ Paul Rock - Autovon 929-7058.

ARMY CORRESPONDENCE COURSE PROGRAM:

The development of the mini-courses (self-paced texts) that teach OE-related subjects to nonresident student is well under way. The first two courses entitled: The Management of Stress and Job Performance Counseling, have been completed. They will be printed and stocked by the Institute for Professional Development (IPD), US Army Training Support Center, Fort Eustis, VA. Placing these courses with IPD has the following advantages:

1. The IPD will fund, print, stock and distribute the courses to nonresident military and civilian students who make application.

2. Successful completion of the course, as demonstrated by passing the final exam accompanying the course, will result in the awarding of credit hours. These hours ultimately lead to promotion points for enlisted personnel.

3. IPD will handle all of the administration involved in dealing with students.

These courses as well as those that will follow, are an alternative to the workshop mode to address individual and group development needs uncovered during assessment activities. Their use can be encouraged when time will not permit the conduct of workshops. In addition, individuals will have access to the courses for self-directed study and professional development even if their organization is not involved in an OE effort.

The IPD is publishing a new catalog which will include these courses. MOS libraries, education officers and most units will have these catalogs along with instructions on how to apply for them.

Copies of the final draft of the first two courses will be sent, minus the final exam, to OESOs in the field for their review and comment. The IPD should be ready to respond to requests for enrollment from the field some time early in November 1978.

<u>EVALUATION DIRECTORATE</u>

OE SURVEY PROGRAM SYSTEM:

This presentation provides current information on the status of the SURVEY Program.

1. BACKGROUND:

The OE SURVEY Program has been in use by OETC and field elements of the US Army since July 1975. Since that time, the system has gone through an evolutionary process. Some important historical events in the progression of the system are:

a. November 1976; agreement between TRADOC, FORSCOM, ADMINCEN and OETC on ground rules and procedures to be set up for the Interim SURVEY System.

b. November 1976; request to DA For Computer Systems Command (CSC) consideration of SURVEY as a Army Class A-1 Computer System.

c. December 1976; MACOMs (TRADOC/FORSCOM) acceptance of the interim system as ready to go to field.

d. December 1976; TRADOC assumed interim Assigned Responsible Agency (ARA) status.

e. January 1977; TRADOC generated and sent to the field the SURVEY SISPAC Vol I, Executive Summary and Vol II, User's Manual as part of a frozen interim system.

f. February 1977; Assistant Secretary of the Army (Financial Mgmt) approved recommendation that SURVEY be designated as Class A-1 System.

g. June-August 1977; OETC completed in draft form Vol V., General System Analysis and Vol VI, Program Documentation.

h. The need for direct coordination between CSC and OETC will continue until CSC has brought the SURVEY System up to an acceptable Army "Class A-1" System level and ADMINCEN has fully developed their role as FPA.

i. When SURVEY becomes an Army Class A-1 System the mark sense optical scan answer sheet will be revised as required. At that time, a request will be made for approval of the answer sheet as a DA Form procurable through normal Army forms distribution channels. During the interim period, OETC, Operations & Support Directorate will honor requests from the field for limited numbers of copies of the answer sheet.

2. CURRENT STATUS:

In this section SURVEY events that have occurred in CY 1978 are indicated:

a. February 1978; Decision made that when the SURVEY System is fully operational, CSC will be the ARA, ODCSPER DA will be the Proponent Agency (PA) and ADMINCEN will be the Functional Proponent Agency (FPA).

b. April-September 1978; DOS-E (30k Supervisor Program) installed at all CONUS (TRADOC/FORSCOM) sites. Revision to SURVEY program for processing with DOS-E also sent to the field by TRADOC-ATDS.

c. July 1978; CSC audit of SURVEY program prior to assumption of ARA.

d. August 1978; CSC assumed ARA, but until system is fully operational, TRADOC will exercise joint responsibility.

3. INFORMATION AND GUIDANCE FOR SYSTEM USERS:

Because the system is not yet fully operational, users need to be aware of the following:

a. The decision has not yet been made as to whether the program will remain in FORTRAN or be converted to COBOL, recommendation is to remain in FORTRAN. If FORTRAN is the choice the system might be fully operational by the end of CY, if COBOL, it could be a year away.

b. Until fully operational the system is still a frozen-interim-permissive system and as such "system change requests (SCRs) will not be accepted for the interim system." (Letter ATDS-OS-SS HQ, TRADOC 10 May 77).

c. Until notified otherwise, requests for system information should be directed to HQ, TRADOC-ATDS, Support Systems Div, ATTN: Mrs. Photinos, AUTOVON 680-3178.

d. ADMINCEN will have primary responsibility for System Change Requests (SCRs) when the system is operational.

e. DA DCSPER as PA will continue to act as the coordinating agency for all of the participating DA organizational elements, i.e., CSC, TRADOC and other MACOMs or Commands.

Phase III:

The goal of Phase III is to determine how best to implement OE in order to maximize the potential of any planned changes. The approach includes the development of a method of assessment which would provide a picture of a unit covering all areas of its organizational functioning. This is necessary in order to plan specific changes in the unit which will improve it. The primary objective of Phase III is to develop a valid, reliable, command-oriented assessment system to assess the organization as a function of its mission. The intent of Phase III is not to measure or evaluate OE programs or efforts, but is rather a research and development effort to produce the assessment system.

The Phase III collection effort was completed in July 1978. The participating units provided a diversity of missions and locations and represent a good cross section of the Army. Analysis of the collected data is underway and will initially include a unit by unit analysis to produce as complete a picture as possible of each participating organization. Later stages of the analysis will allow the identification of key elements contributing to the expanded measures of an organization's effectiveness, i.e., those measures outside of the traditional indicators such as IG reports, readiness reports, and other public historical documents of a unit.

As a by-product of the analysis effort, the Evaluation Directorate is providing feedback information to those units who participated in Phase III. This feedback data consists largely of descriptive statistics from survey and observation data and will include summative data collected through interviews. To date, one such feedback package has been delivered and the second should be delivered by 31 October 1978. This process will continue until all eight units have been included and will occur prior to the start of Phase IV.

In Phase IV the goal is to tie together Operations Research Techniques with the organization type in such a way that following the premeasure assessment of an organization the OESO will determine which implementation techniques should be used. A subsequent postmeasure will assess how well those techniques worked. Ultimately, this data will be used to provide information that will allow informed judgements to be made about the efficiency, adequacy, and performance of OE by those in appropriate positions.

TRAINING DIRECTORATE

OENCO COURSE:

Two 10 week prototype courses for training approximately 90 noncommissioned officers at the Organizational Effectiveness Training Center

(OETC), are scheduled for January and May 1979. NCO's selected will participate in a program to determine the role of the noncommissioned officer on organizational effectiveness (OE).

Upon graduation, Organizational Effectiveness Noncommissioned Officers (OENCO's) will serve under OE Staff Officers (OESO's) at various levels throughout the Army. Their role, selection criteria and the program of instruction will be evaluated during the year following their completion of OETC.

OENCO's in the grades of E7 through E9 will be trained in duties which include administration, planning and assisting the OESO in the design and conduct of OE activities, as well as teaching OE in Army Service Schools and NCO Academies.

The integration of NCO experience in combination with the OESO constitutes a major milestone toward accomplishment of the ultimate goal of the United States Army - Combat Readiness.

ADVANCED TRAINING WORKSHOP:

A recent Army Chief of Staff decision memorandum approved the use of experiential learning methodology in instruction to be presented to the Pre-Command Course. To assist in the implementation of this decision, the Managerial Skills Division hosted a one-week (18-22 Sep 78) Advanced Training Seminar/Workshop attended by eight service school OESO's. The overall goal of the seminar was to increase attendees' skills in facilitation, systems, and experiential learning to a degree that they may be able to effectively transfer these skills to PCC instructors at their respective service schools. At the conclusion of the workshop, the OESO's were not only able to transfer those advanced skills learned, but were also prepared to assist their service schools in:

a. Incorporating the systems view of a military organization into PCC instruction.

b. Modifying existing didactic PCC instruction to incorporate the experiential learning method.

PRE-COMMAND COURSE:

The Pre-Command Course (PCC), previously known as the Command Refresher Course Program, was established in July 1977. The intent of the program is to assist battalion and brigade command designees in their preparation to assume command. The course is diverse in nature and designed to accomodate both CONUS and overseas commanders. Recent revision of the program resulted in the consolidation of various parts of the course and the addition of Organizational Effectiveness Training to the instruction. On 13 September 1978, the Army Chief of Staff was briefed on the Command Development week of the Combat Arms Pre-Command Course. The Chief of Staff approved the instruction concept, which incorporated training in Organizational Effectiveness, and indicated the importance he attaches to the course by personally speaking at the conclusion of each class. OETC will actively be involved in this Fort Leavenworth phase of PCC instruction covering POI's dealing with: Systems View of an Organization; Situational Leadership Theory; Time/Stress Management; and OE and the role of the OESO. The first Command Development week's instruction will be conducted during the period 6-10 November 1978. The high visibility of the PCC is expected to have broad impact not only on OETC but the Army's overall OE effort.

CONCEPTS DEVELOPMENT DIRECTORATE

OE IN COMBAT:

Major Dick White continues to work on the OE in Combat project in conjunction with the Army Research Institute/Human Resources Research Organization research project to relate process performance and unit mission readiness. This effort has taken Dick to the 8th Infantry Division where he observed Majors Ralph Ripley and Jim March doing process performance observation of the battle staffs of all divisional maneuver battalions during the 8th Infantry Division's summer training exercise, Cardinal Point II.

Work in this area has also been done by Majors Mike Hurley and Jerry Froelich of the 101st Airborne Division (Air Assault) and by CPT Dan Skaff, 4th Infantry Division during this fall's Reforger Exercise. All groups were trained by Dr. Joe Olmstead, senior scientist, HUMRRO.

During this FY, FORSCOM units will participate in the study while going through Combat Arms Tactical Training Simulator (CATTS) at Fort Leavenworth. Dr. Olmstead will train the OESO's who will participate. He will also train OESO classes 4&5/78 in early November. In addition, he will train the OETC faculty in order to integrate the training into the OESO course.

OPEN SYSTEMS PLANNING:

Concepts is also working on an open systems planning model exportable package. Open systems planning addresses a major shortcoming of goal setting and action planning as presently taught in the 16-week course. That shortcoming limits the primary focus of assessment and planning to the internal system or organization. For example, the OESO asks the commander to address only those items for planning that he can do something about (generally the internal system) and ignore those items he can't affect (the environment).

The open systems approach adds two major areas for consideration: the ENVIRONMENT and the FUTURE. In addition, the approach asserts that the environment and the future exert a major influence on the organization and that they are, to a degree, predictable and controllable. Major Fahey is working on a modular design that will enable OESO's to implement such an approach. In addition, OETC will host an open systems workshop/seminar this fall to explore these issues.

3-10 YEAR OE PLAN:

Captain Tom Hawks of the Concepts Directorate completed the preliminary work on the OE 3-10 Year Plan. The Plan will become operational at the conclusion of the current 1-3 Year OE Institutionalization Plan and will direct the development of OE from competence in a somewhat narrowly focused effort to a complex, multifaceted approach designed to address the effectiveness of the Army as a total system through the 1986 time frame.

Captain Hawks, Major Ritter, and Captain Popov of the Concepts Development Directorate utilized a futures planning format as a vehicle for writing the plan. Briefly, a scenario was constructed which endeavored to describe the OE environment at the conclusion of the 3-10 Year Plan. With this scenario serving as terminal objective, CD was able to construct a plan which logically developed each functional area (policy and doctrine, OE management, selection/assignment, research, structure, training/training development, education, professional development, information and evaluation) from the present time through the next seven years to 1986.

The future of OE looks exciting and, even more important, it will be attainable with the 3-10 Year Plan. Staffing begins in mid-October and will culminate with a decision at the General Officer Steering Committee in January of 1979.

Any questions regarding these activities can be directed to the project officers in the Concepts Development Directorate (AV 929-7106/7108).

OPERATIONS AND SUPPORT DIRECTORATE

ASSIGNMENTS/REASSIGNMENTS:

There have been a large number of recent assignment changes within OETC. With the graduation of Class 3-78, eight Noncommissioned Officers have been added to the staff to assist in implementing the pilot OENCO courses.

LTC Joseph Watt has taken over as Chief of the Evaluation Directorate replacing LTC Oscar Mack who will PCS in October. MAJ (P) Ron Sheffield has become the Executive Officer as well as the Chief of Operations and Support. To fill the void left by the loss of Captains Bill Nuffer, Paul Best and Dan Popov, Captains Bill Langford, TD, Tom Hawks, CD, and Kieran McMullen, DTD, have made the move to the Evaluation Directorate.

VISITORS:

OE and OETC still generates a lot of interest and a lot of visitors. Recent visitors have been MG Ben Harrison, CG ADMINCEN; BG H. G. Crowell, Jr., ADCST for Operations at TRADOC; Mr. Richard Danzig, Deputy Assistant Secretary Defense for Program Development; Dr. Sue Dueitt, Special Assistant to Assistant Secretary of the Army for Manpower and Reserve Affairs; and Mr. Don Mulcahy, IBM Corporation.

Upcoming are visits by LTG J. R. Thurman III, DCG TRADOC; MG DeWitt Smith, CG Army War College; and BG Joseph Kastner, ADC 101st Airborne Division.

RECAP:

A statistical summary relative to the selection, assignment and promotion of OESO's, provided by MAJ Gesner, MILPERCEN follows this section.

OE TRAINING COURSE
STATISTICAL RECAPITULATION
CLASS NUMBER 4-78

CATEGORY		OPMD INPUT				COMMAND INPUT				AGGREGATE			
		4-78		TOTAL		4-78		TOTAL		4-78		TOTAL	
TYPE	ITEM	QTY	%	QTY	%	QTY	%	QTY	%	QTY	%	QTY	%
GRADE	LT			2	.7	1	14	1	.8	1	3	3	.8
	CPT	22	71	167	62	4	57	71	60	26	68	238	61
	CPT(P)			14	5			10	8			24	6
	MAJ	8	26	74	27	1	14	26	22	9	24	100	26
	MAJ(P)			2	.7			2	2			4	1
	LTC	1	3	11	4			7	6	1	3	18	5
	LTC(P)												
	COL					1	14	1	.8	1	3	1	.3
BRANCH	IN	11	35	107	40			35	30	11	29	142	37
	FA	3	10	38	14	1	14	11	9	4	11	49	13
	AR	5	16	25	9	1	14	6	5	6	16	31	8
	AD	1	3	9	3			4	3	1	3	13	3
	SC	4	13	10	4			1	.8	4	11	11	3
	EN	2	6	8	3			6	5	2	5	14	4
	MP	1	3	4	1	1	14	6	5	2	5	10	3
	MI	2	6	7	3	1	14	4	3	3	8	11	3
	AG	2	6	45	17			17	14	2	5	62	16
	FI							1	.8			1	.3
	TC			9	3			3	3			12	3
	QM			5	2			3	3			8	2
	OD			2	.7			2	2			4	1
	CM			1	.4			1	.8			2	.5
	MSC					1	14	16	14	1	3	16	4
	SJA												
	CH					2	29	2	2	2	5	2	.5
COMMISSION	RA	19	61	160	59	2	29	65	55	21	55	225	58
	USAR	12	39	109	40	5	71	53	45	17	45	162	42
	NG			1	.4							1	.3
SOURCE OF APPOINTMENT	USMA	2	6	20	7			12	10	2	5	32	8
	ROTC	18	58	126	47	1	14	55	47	19	50	181	47
	OCS	9	29	102	38	2	29	34	29	11	29	136	35
	DIR/OTHER	2	6	22	8	4	57	17	14	6	16	39	10
MEL	AOC	31	100	269	100	5	71	113	96	36	95	382	98
	CGSC	6	19	38	14	5	71	25	21	11	29	63	16
	AFSC/OTHER	1	3	7	3					1	3	7	2
CEL	BACH DEGREE	31	100	270	100	7	100	116	98	38	100	386	99
	ADV DEGREE	11	35	97	36	6	86	47	40	17	45	144	37
RACE	CAUCASIAN	29	94	245	91	7	100	113	96	36	95	358	92
	BLACK	2	6	22	8			5	4	2	5	27	7
	OTHER			3	1							3	.8
OTHER	WAC	2	6	8	3			3	3	2	5	11	3
	CIV					3	30	16	12	3	7	16	4
	EM			11	4			8	6	[illegible]		19	5
TOTAL OFFICER INPUT		31	82	270	70	7	18	118	30	38		338	

OESO

PROMOTION SUMMARY

CATEGORY	PRIMARY ZONE: PREVIOUSLY CONSIDERED			PRIMARY ZONE: FIRST TIME CONSIDERED			PRIMARY ZONE: RECAPITULATION			SECONDARY ZONE		
	PC ELIG	PC SEL	% SEL	FTC ELIG	FTC SEL	% SEL	TOTAL ELIG	TOTAL SEL	% SEL	SZ ELIG	SZ SED	% SEL
1977 CPT to MAJ (AUS)												
Total Eligible	1	0	0.0	20	18	90.0	21	18	85.7	30	2	6.6
MILPERCEN Quality Screened Total	0	0	0.0	18	18	100	18	18	100	30	2	6.6
Army-Wide Total	1195	241	20.2	2562	1955	76.3	3757	2196	58.5	6351	159	2.5
1977 MAJ to LTC (AUS)												
Total Eligible	0	0	0.0	17	12	70.5	17	12	70.5	5	1	20.0
MILPERCEN Quality Screened Total	0	0	0.0	14	12	85.6	14	12	85.6	5	1	20.0
Army-Wide Total	1088	150	13.8	1590	1067	67.1	2678	1218	45.5	3235	154	4.8

OESO
PROMOTION SUMMARY

CATEGORY	PRIMARY ZONE: PREVIOUSLY CONSIDERED PC ELIG	PC SEL	% SEL	FIRST TIME CONSIDERED FTC ELIG	FTC SEL	% SEL	RECAPITULATION TOTAL ELIG	TOTAL SEL	% SEL	SECONDARY ZONE: SZ ELIG	SZ SEL	% SEL
1978 CPT to MAJ (AUS)												
Total Eligible	3	0	0.0	56	53	94.6	59	53	89.8	79	6	7.6
MILPERCEN Selected Total	0	0	0.0	56	53	94.6	56	53	94.6	79	6	7.6
Army-Wide Total	954	143	15.0	3174	2365	74.5	4128	2511	60.8	5420	279	5.1
1978 MAJ to LTC (AUS)												
Total Eligible	5	1	20.0	11	9	81.8	16	10	62.5	32	1	3.1
MILPERCEN Selected Total	3	0	0.0	9	7	77.8	12	7	58.3	24	1	4.2
Army-Wide Total	903	124	13.7	1455	1011	69.5	2358	1135	48.1	3053	151	5.0

ORGANIZATIONAL EFFECTIVENESS STAFF OFFICER
STRUCTURE AND AUTHORIZATIONS
(AS OF 1 JUN 78)

ACTIVITY	OFFICER MANPOWER REQUIREMENTS								
	1 JUN 78 MTOE-TDA AUTH LEVEL	1 JUN 78 ASSIGNED OESO	KNOWN LOSSES JUN-DEC 78	CONFIRMED GAINS JUN-DEC 78	PROJECTED GAINS JUN-DEC 78	31 DEC 78 OESO FORCE	31 DEC 78 FORCE-STRUC DEVIATIONS	CY 1978 DCSPER-HRO STRUCTURE	CY 1979 DCSPER-HRO STRUCTURE
TRADOC	95	85	14	22	5	98	+3	95	100
FORSCOM	93	79	24	30	2	87	+6	81	99
USAREUR	53	51	10	28	4	73	+4	69	69
HQDA	9	7	0	1	0	8	-8	16	16
DARCOM	11	3	0	2	2	7	-9	16	16
USACC	12	5	0	2	1	8	-5	13	13
HSC	8	5	0	4	3	12	+1	11	11
EUSA	9	10	2	1	0	9	0	9	9
INSCOM	0	3	0	1	1	5	-2	7	7
MDW	2	2	1	1	0	2	0	2	2
USARJ	1	1	0	1	0	2	0	2	2
MTMC	1	2	0	0	0	2	0	2	2
USACIDC	0	1	0	1	0	2	0	2	2
USAREC	2	2	0	0	0	2	0	2	2
USMA	2	2	0	0	0	2	+1	1	3
USAWC	1	1	0	0	0	1	0	1	1
MILPERCEN	1	1	0	1	0	2	-1	1	1
NGB	1	1	0	0	0	1	+1	0	1
TOTAL	301	261	51	95	18	323	-7	330	356

HSC MEDICs in OE

The US Army Health Services Command with the graduation of class 2-78 has 10 of their 12 authorized positions filled. The incumbents and locations are as follows:

LTC J. Severson	Brooke Army Medical Center Ft Sam Houston, TX
MAJ P. Brenner	Walter Reed AMC Washington, DC
MAJ J. Locke	Fitzsimons AMC Denver, CO
MAJ D. Odum	MEDDAC Ft Benning, GA
CPT W. Butkovich	HQ HSC Ft Sam Houston, TX
CPT B. High	Academy of Health Sciences Ft Sam Houston, TX
CPT C. Troutman	HQ Ft Detrick, MD
CPT W. Barko	Madigan AMC Ft Lewis, Washington
CPT B. Horak	MEDDAC, Ft Hood, TX
CPT M. O'Brien	MEDDAC, Ft Bragg, NC

ITEMS OF INTEREST

BOOK REVIEW

SFC Richard L. Hines
Training Dev Directorate
OETC

Lippit, Gordon and Lippit Donald, The Consulting Process in Action, University Associates 1978.

This work is an excellent collaborative analysis covering the past ten years of both authors' experiences as consultants. The most valuable aspect of the book is the authors' abilities to reduce technical language and processes to logical and easily understandable discussions, focusing on the most general aspect of the helping process - consultations. Several of the activities of those who lead, direct, teach, or interact with others as friends or peers are characterized in terms of the roles and functions of a consultant. Such people are characterized as consultants at various points in the text. Distinction is made between the help-givers located in the same setting or organization as those they are serving and those located outside the organization (internal consultants and strictly external consultants).

Because of the close parallels that emerge between the procedures discussed in the text and the normal consulting process used by OESOs/OENCOs, I have chosen to address each procedure separately.

The book consists of seven chapters, all of which deal with some procedure central to the duties of an OESO/OENCO in assisting commanders/leaders to increase unit effectiveness and optimize mission accomplishment. The first chapter deals with the need for competency in consulting and the ever-increasing demand for consultants who are both internal and external. Relevant, appropriate, and practical applications for several different client systems are also provided. Chapter two focuses on the dynamics of the phases of the consulting process, especially in its initial stages. This chapter also gives examples of each authors' experiences with different client systems. Chapter three outlines the multiple roles of the consultant and offers some criteria for consultant-role selection. The fourth chapter focuses on the decision and action phases of the consulting process. It provides indepth discussion of diagnostic intervention and dilemmas, collaboration, resource identification and timing. Chapter five's logical follow-on deals exclusively with ethical dilemmas and guidelines. It also focuses on the ethics of consulting and a review of some specific ethical dilemmas encountered and provides a summary of how each was handled. Chapter six deals with action research in terms of data gathering methods which for the most part are the same as those outlined in the first step of the four-step OE process. This chapter also provides a very detailed analysis of several collection methods, including their advantages and disadvantages. The chapter concludes with models of action research and its application to the consulting process. The final chapter of this useful text focuses on the consultant's skills, competencies, and professional development. The authors conclude with a series of questions and collaborative answers concerning perceived competencies, professional development, and consulting skills.

This book is strongly recommended for OESOs/OENCOs and commanders contemplating using an OESO in the future. The book is the next best thing to being able to pick the brains of two successful consultants.

SOME THOUGHTS ON ENTRY INTO AN ORGANIZATION OR IMPLEMENTING ASSESSMENT

CPT Joseph Riley
MAJ George Long

The talk has been for some time that OE in general is having difficulty getting past assessment into planning, implementation and evaluation. OETC research and evaluation has confirmed this suspicion to a degree and we have experienced the frustration with several clients. On a grander scale there is a considerable effort to document the number of hours and monetary costs and savings as a result of OE. This all boils down in part to difficulties on the part of the client systems at all levels in understanding what OE is, how OE does what it does, and what it can do.

These notions appear more evident in working with clients when it comes time to plan and execute action. Our hypothesis is that planning and implementation are difficult because the client isn't aware of the OESOs skills in sufficient degree to accomplish these steps alone and the OESO is realistically concerned with being directive and owning the problems. The result can be (1) termination with the OESO and traditional problem solving on selected "issues"; (2) frustration with the effort and termination with no further action; (3) actions decided by the OESO with little or no commitment on the part of the client (owning the actions alone).

We have been looking at this and have come up with some notions about how to address this problem in our practice. By mutual agreement with a current client we are testing some of these notions. As of yet there is insufficient data to say they will work or that they are the total answer. However, at the request of several OESOs we have discussed those ideas with, we are presenting them so that the synergistic effect of all of us operating in the field can be set in motion.

The basic idea begins with Argyris's notions about valid information, free, informed choice, and internal commitment. We began by saying to ourselves "how can we achieve these conditions." We have labelled these ideas under a heading of environmental preparation or OE readiness. It is not a new idea but we are now not assessing but "implementing an assessment" in the organization. The difference is subtle. These are some of the steps involved.

1. We don't begin an assessment unless the system is ready. Our approach is that we will talk about beginning assessment, do the necessary environmental prep work to begin assessment, or wait for a more opportune time for both the client and the OESO.

2. We assess the client system for OE readiness during the initial interview on some admittedly subjective criteria.

a. Does the client have some specific objectives in mind that we can work with or is he/she willing to establish some?

b. Is the client willing to take some risks?

c. Is the client asking about costs in terms of time and manpower? OE is not free.

d. Is the client willing to work with the OESOs or is he saying "come in and do your thing?"

e. Is the client willing to collectively (with his staff) determine objectives and contract? (Risk, commitment, and cost).

f. Is the client willing to build internal capability and undergo training in the initial stages?

g. Is the client open and authentic?

h. Will the client send his leaders to L&MDC and/or other management workshops?

3. During the entry process and as a part of assessment preparation we begin testing these criterion.

a. We conduct a briefing for the staff on OE and work at addressing tough questions. There needs to be some tough questions such as costs.

b. Our contract is written and addresses the readiness issues. We ask for the client and his staff to contract with us collectively after a preliminary session with just the client. This is also a team building effort and was a 2 ½ hour session.

c. We asked the client to determine objectives with us and his staff. More team building work. In fact we did some structured exercises on assumptions and communications. This was five hours of work in two sessions because we also talked about how to measure success of the OE effort.

d. We provide theoretical input on the GOQ, interviews, and observations. We then ask them to work with us on devising additional questions which get at their objectives more specifically. Also the staff decides, with our help, on how the data should be broken down to insure anonymity. Some of the questions we ask are:

"What does the answer to this question look like, what are you trying to find out?"

"How does this data break protect anonymity and is it necessary to do so?" We don't push hard on this one.

e. Another action is to conduct some workshops along general areas of management. An example would be a one day workshop on group dynamics and leadership. (Such as a workshop around using FIRO - pg 10 75 UA Annual #138 as the central theme).

f. The client systems must also assist us in administering the GOQ and conducting interviews to build internal capability and show ownership and commitment.

g. We use the additional time spent in preparing for assessment to model the behaviors we would like to see in the client system.

Thanks to one of Mike Mitchell's comments at the OE conference in Colorado Springs we are also instituting another procedure. Mike said that he had shifted to being very positive with the client, i.e., What are you doing well and can you do more. We are doing some of this during the assessment implementation, and it is serving several purposes in our minds:

1. It causes the client system to be more success oriented and less problem solving oriented. Feedback is less negative and more acceptable.

2. It provides us some implementation while we are waiting to get started with and finish the assessment. The client can get impatient "working to just get started."

3. It provides a means to establish interdependence with the client system in a very positive way.

4. It is another way to demonstrate some skills and techniques prior to feedback and planning.

Another notion that begins to creep in is Schutz's FIRO notions and Schein's expert vs process consultation ideas best explained by a chart.

LEADERSHIP, GROUP BEHAVIOR, & CONSULTANT BEHAVIOR

RELATIONSHIP	GROUP STAGES	LEADERSHIP STYLE	CONSULTANT STYLE	ACTIONS
Dependent	Inclusion	Power	Expert/Directives	Objectives Contracting
Independent	Control	Leadership	Trainer/Teacher/ Semi-Directive	Workshops Assessment Planning
Interdependent	Affection	Authority	Process Consultant/ Non-Directive	Planning Implement

We are not looking for absolutes nor do we have visions of clients arriving at high levels of affection prior to planning an implementation but we feel we must work toward those ends. One of the things that this may avoid is the client and the OESO arriving at a point after feedback where the client doesn't know what to do next and the OESO won't take on the problem alone. By developing the relationship and determining where the relationship is, you then have a yardstick as to what type of consultant style best fits the situation and a way to eliminate or to work through the impasse. Our hypothesis is that you can best be non-directive when the group (client system & consultant) have reached some level of affection, interdependence, and trust.

As said earlier, we are not sure that all of this works or that it is complete. Without a whole lot of discourse it does seem to address some of the problems we have experienced. It is a more lengthy process but our hypothesis is that it will pay off in the future. Our only real proof is that the work with our experimental client at least feels better.

OE IN ROTC--IS IT NEEDED?

CPT Danny McGrew
2nd ROTC REGION

On arrival at the Second ROTC Region Headquarters located at Fort Knox, Kentucky, in December 1977, several questions concerning the application of OE to ROTC were paramount to me. Having never been associated with ROTC in any way, my greatest concern was to find out how it worked and if it was different, then identify how it was different from "the rest of the Army." There had never been an OESO assigned to ROTC and no institutional memory of focus, procedures, pitfalls, etc., were present. In addition, I was concerned about how to "spread" myself among sixty-seven universities and assist in promoting positive organizational change. The spread of command and control in ROTC is a geographical nightmare. In the Second ROTC Region, this span covers the eight states of Wisconsin, Michigan, Illinois, Indiana, Ohio, Missouri, Kentucky and Tennessee, with headquarters located at Fort Knox, KY. It is not uncommon for some of the personnel assigned to a university to never visit or interact with personnel of the headquarters. This situation has great implications in attempting to foster a team concept and trying to establish credibility among the detachments and the headquarters. Most detachments operate with 8-10 personnel and are responsible for a myriad of goals and tasks; namely, enrollment and retention of cadets, instruction at all year levels, operating a military detachment, answering to a Region Headquarters, TRADOC and Department of the Army and interacting with a civilian community. Therefore, in order to survive and accomplish its goals, a detachment must be functionally oriented, must have a high degree of awareness of the interpersonal issues present in a small organization and foster a positive working relationship with its higher headquarters.

My goal as an OESO is to assist in creating large-scale organizational change through positive change made in individual detachments.

Since enrollment and retention are the greatest issues facing ROTC, my energy has been, and will continue to be, focused in this area. For example, if I work with a detachment that is experiencing problems in enrollment and then return at some later date for follow-up and discover that detachment is no longer experiencing those problems, it is conceivable to attribute this success to OE: however, the most important factor is that positive change has occurred and as a result, change in consonance with the entire organization has occurred. Some examples of the types of operations I normally conduct are: Work with the detachment to establish realistic goals; this is accomplished by "brainstorming." Brainstorming is soliciting as many goals from the detachment personnel as possible without allowing them to evaluate the credibility of those goals. Once the list of potential goals has been identified, then "Action Plan" those goals, one by one, until goals that are acceptable by all or a majority are identified. Action Planning in this case is defined as a process of generating a list of specific goals, evaluating those goals in terms of realistic accomplishment and then selecting the best ones. Example: State the goal, identify the success criteria by listing the sequence of steps that are necessary to address the goal and resources necessary to accomplish the goal and then commit those resources toward the accomplishment of that goal. Usually, by utilizing this process, the detachment can reduce the number of goals they previously were trying to accomplish and increase their effectiveness in the attainment of the goals they have now identified as important to the organization.

Another example of the type of operations that are conducted is "Team Building." It is imperative that detachments function as a team. Since the detachments normally are of 8-10 personnel, each individual is delegated with a great number of responsibilities, and many of these responsibilities require interaction among members of the detachments as well as cadets. Therefore, a Team Building exercise is designed to provide an atmosphere whereby interpersonal issues and conflict can be surfaced, explored, and resolved. The effect of an exercise of this nature reduces the issues that inhabit a team from becoming effective and promotes improved relationships between the detachment members.

The Transition Workshop for Change of Command is proving to be a powerful tool in ROTC. A Transition Workshop enables the incoming Professor of Military Science (PMS) to assume the role of leadership rapidly and prevents "down-time" by passing on to the new PMS concerns and expectations of the detachment members, enables a close and shared understanding of the major priorities/goals of the organization in the next six to nine months, determines some realistic improvement actions to achieve these goals and lastly, it assists the PMS in examining the organization's internal management procedures and identifying issues for improving overall effectiveness. If these operations are successful on a wide scale, then large-scale positive change occurs which results in goal achievement for the parent organization, Region HQ. The concern I initially experienced with how to "spread" myself among sixty-seven universities has been addressed by setting up a common data-sharing base. After I conduct a number of operations in varied school environments, I share this data, in a general way, with the rest of the Region. This technique is proving to be effective in assisting the detachments in identifying potential problem areas.

OE _is_ needed in ROTC. The span of command and control problems that face ROTC create a feeling of separateness that exists due to the geographical displacement of the HQ and its subordinate units. This feeling of separateness needs to be constantly confronted in order to promote the team concept and thereby increase organization effectiveness. The small-group, interpersonal demands placed upon military personnel who function daily in a civilian environment create a dynamic which needs to be identified and managed. Lastly, the increasing demands of the Army for greater quantities of high qualify officers create a need for a professional, ROTC team dedicated to achieving and fulfilling the Army's needs. OE can help ROTC to fulfill those goals.

THE DELPHI TECHNIQUE:
APPLICATIONS TO THE ARMY'S
ORGANIZATIONAL EFFECTIVENESS PROGRAM

CPT William Barko
Madigan Army Medical Center

While attending OETC Course 1-78, CPT James Affonco and I were searching for ways to gain additional information about the use of Organizational Effectiveness programs, strategies, and techniques in medical organizations. Since we were scheduled for assignment in medical organizations, it was perceived that additional information on OE activities could enhance our initial entrance into these organizations. Also, such information could provide a basis for our program planning within these medical settings. Overall knowledge of OE in these settings was limited. The Army had only recently assigned OESOs to medical organizations. Some of the feedback we had received about OE application in medical settings had emphasized the difficulty of its successful application because of the uniqueness of the setting. We searched for a method to obtain further information from some of the nation's leading consultants and prominent internal consultants concerning their experiences in medical settings. Since this project is still continuing and data obtained is incomplete, this article will discuss the general application of Delphi methods in OE work.

The Process

The Delphi process was developed at the Rand Corporation by Dalkey and associates. It has been defined as a technique which provides for systematic solicitation and collation of judgements on a particular topic through a set of carefully designed sequential questionnaires, interspersed with summary information and feedback of opinions derived from earlier responses.[1] The Delphi is administered over a period of time to individuals geographically separated. It does, however, provide the type of information which allows the participants to get a complete picture of the issue or question being discussed. Its comparable to a conference with participants geographically separated. The separation allows participants to share opinions, insights, and information without the risk of peer criticism or chastisement. It also provides them a considerable period of time, often a week, to reconsider their ideas or refine them. The focus is on allowing participants the time and atmosphere which lend itself to individually creative thought. Through this process, the Delphi developer may receive an abundance of information. Additional personal insight may be gained from the issues raised by participants. It is also quite probable that significant related and tangential issues will evolve through the use of the survey.

Structure

The Delphi method was created with structural flexibility in mind. Linstone describes two distinct forms of the Delphi. The conventional Delphi generally has the surveyors providing a questionnaire structure, with results being tabulated and analyzed manually by the surveyors. The results are fed back directly to respondents who can be asked to make comments about the information, adjust their previous responses, or answer certain general questions about the information. Each questionnaire is based directly on the results of the previous one. The real-time Delphi uses a computer to assist in the compilation of group results. An effort is made to speed up the Delphi process and reduce the time necessary for summarization of information after each step in the process.[2]

Even though the Delphi is extremely flexible, certain key steps should be accomplished when using its structural format.

Delphi Activities

1. Develop Delphi Question. Know what question you want addressed before developing the Delphi.

2. Select the Type and Size of Participating Sample.

3. Contact Respondents. Inquire about their potential interest and knowledge in the area you wish to survey.

4. Develop and Distribute Questionnaire #1. This questionnaire should be brief and open-ended. Responses should be based on broad problem issues.

5. Analyze Questionnaire #1. Summarize the results of the respondents. It should be short enough to be reviewed quickly and easily.

6. Develop and Distribute Questionnaire #2. This questionnaire should completely convey information collected during Questionnaire #1. It can be categorized into areas of agreement or disagreement. Comments can be requested about these categories.

7. Analyze Questionnaire #2. Some prioritizing or classification of responses can be done.

8. Develop and Distribute Questionnaire #3. The structure should provide for review of previous responses. A request for judgements on priorities and classification of issues can be done. Respondents can still be provided with a chance to adjust answers.

9. Analysis of Questionnaire #3. Focus should be on providing a concise, clear format for summary. Summary should focus on information related to your initial Delphi question. Final comments can be requested.

10. Distribute Final Report and Summary. This is sent so all participants can make final closure on the process. Surveyors' learning can be summarized in this report.

Because of its flexibility, the Delphi is not limited to three questionnaires. When the structure exceeds three, the process may become susceptible to excessive focus on new issues arising during the Delphi. These new issues may be relevant but not closely related to the initial Delphi question. Previous Delphi use has demonstrated that as the number of questionnaires increases, the rate of return is diminished and the total amount of expected information received is limited. Even with close monitoring and strict adherence to concise survey format, response rates to the third and subsequent questionnaires may be dramatically curtailed. In order to provide the opportunity for maximum participation during the Delphi process, certain principles of survey development should be followed. The check list below may be helpful in maintaining high rates of participation through the process:

Delphi Check List

1. Select an interesting and applicable topic for yourself and the respondents.

2. Be sure you have a question you want to gain information on during the survey.

3. Select respondents who have the knowledge and expertise to answer your questionnaires.

4. Test your questionnaire before distributing.

5. Feedback all the information you receive to respondents. Do not selectively edit.

6. Send a cover or introductory letter with each survey. Make it personal and explanatory.

7. Let the respondent know how long he will be participating in the survey.

8. Give the respondent a specific due date for return of the questionnaire.

9. Send a self-addressed, stamped return envelope with the questionnaire.

10. The questionnaire should be brief. Try to keep it on one legal size piece of paper. If it becomes too long, many respondents will not complete it.

11. The survey needs to be professional and grammatically flawless. If it looks right, participants will most often take the time to complete it.

12. Use a code number on your answer sheets and return envelopes in order to identify participants. In preparing a participant list assign a number to each participant.

The preceding tips, along with procedures described by Delbecq in Group Techniques for Program Planning should provide the necessary information to develop and administer effective questionnaires using the Delphi technique.

Conclusions

Through use of the Delphi technique, considerable information about OE interventions in medical settings has been gained. The following describes some of the many learnings identified through this work:

1. The survey has provided a wealth of information about OE interventions in medical settings.

2. It gave respondents a chance to discuss personal issues, concerns, and biases about their OE work.

3. It demonstrated that these participating professionals have divergent views and philosophies about the use of OE strategies.

4. It has produced considerable information about specific OE strategies and techniques, their rate of use, and perceived effectiveness in medical organizations.

5. It provided an extensive amount of information to support our initial entrance into our organizations.

6. Many issues raised during the survey were unknown previously and provide new information and insight.

7. The survey provided an opportunity to communicate with many experienced and established OE professionals.

8. It has added new insight into certain strategies and has provided information about OE pitfalls in medical settings.

9. Many respondents also expressed or described their personal learnings experienced through participation in this survey.

It is apparent that the Delphi method can provide the Organizational Effectiveness Staff Officer with a technique for information gathering, knowledge exchange, professional support, and a basis for future program planning. It provides a means by which specific OE related problems and issues can be discussed. It may save the OESO the time, energy, and personal trauma often associated with learning from your own experience.

Its present worth and future potential easily outweighs the time spent devising, monitoring, and evaluating its results. Delphi techniques are flexible and require a minimum knowledge in the development and use of questionnaires and related statistical analysis. The Delphi is a multipurpose instrument which offers the OESO a dynamic method for information gathering.

FOOTNOTES

1. Adre L. Delbecq, Andrew H. Van de Ven and David H. Gustafson, Group Techniques for Program Planning, (Dallas: Scott Foresman and Co., 1975), p. 10.

2. Harold A. Linstone and Murray Turoff, The Delphi Method, Techniques and Applications, (Reading: Addison Wesley Publishing Co., 1975), p. 5.

PART-TIME INTERNAL CONSULTANTS HQ FORSCOM

Jack W. Collier, PhD
HQ FORSCOM

1. <u>BACKGROUND</u>: Organizational Effectiveness was officially initiated in Headquarters US ARMY FORCES COMMAND in the fall of 1975. A decision was made at the outset to have a small full-time staff supplemented by part-time personnel who were initially referred to as interns and later to be internal consultants (IC). Two or three persons for each general staff and one person for each special staff section were selected by the OE Project Officer and concurred in by the staff section to be interns. This initial procedure was changed and will be discussed later. The basis for initial selection was primarily formal education at the graduate level in the behavioral sciences. About twenty people were selected with about a two to one ratio of military to civilians.

Support to the internal program was personally given by the FORSCOM Commanding General. The OE Project Officer was on the personal staff of the CG. The CG periodically met in his office with the internal consultants to determine if changes should be made to the program.

Training for internal consultants during the very early days of OE at HQ FORSCOM was task oriented. A need existed for the interns to collect data through sensing sessions so they were trained in sensing techniques and then applied this knowledge. An orientation on questionnaire administration was conducted followed by the interns administering the GOQ headquarters-wide. This was followed by training in feedback procedures and actually conducting feedback of GOQ data throughout the Headquarters. This training was conducted by consultants provided by a civilian contractor.

Task related training appeared to be effective and maintained a high level of interest on the part of the interns; however, as OE activities in the Headquarters became more diversified it became less practical to expose all of them to training which they could apply immediately. Efforts were then made to do some team building with the interns and to provide them with some general OD skills. Without a clear direction and some commitment, interest in and attendance at training started declining rapidly.

In an effort to revitalize the intern program, procedures for selection were changed so that the staff section nominated individuals to serve as part-time internal consultants with final selection made by the OE office. The appointed internal consultants were then involved in designing their own training program. This appeared to increase their interest but training attendance and utilization remain a problem apparently because of conflict with principle duties.

Over a period of two and one half years a 100% turnover of internal consultants has been experienced. The current representation is a two to one ratio of civilians to military which compares favorably with the distribution in the Headquarters. The internal program is now in the Office of the Chief of Staff and is considered to be a vital part of the successful OE program in HQ FORSCOM.

The Organizational Effectiveness program orientation in Headquarters FORSCOM has shifted somewhat from its initial humanistic direction to more of a systems approach. This has had some impact on the kinds of people selected for the program and the training they receive.

2. OBJECTIVES: The following program and administrative objectives have been established and included in a Headquarters official memorandum.

a. OE Program

(1) To integrate personnel, tasks, and work environment thereby increasing organization effectiveness.

(2) To improve management and job satisfaction through the use of behavioral science technology.

(3) To optimize and strengthen the chain of command.

(4) To increase the quality of life for the individual within the Headquarters.

b. Administrative

(1) To maintain a cadre of qualified internal consultants for implementing the OE Program.

(2) To explain available OE services and methods for requesting or scheduling them.

(3) To establish orientation procedures for new supervisors entering the organization.

(4) To clarify the role of internal consultants.

(5) To improve individual knowledge and awareness of OE activities with HQ FORSCOM.

3. ADVANTAGES: Some of the recognized advantages of having part-time internal consultants are:

a. They know the organization. It has proven invaluable to have a person in the organization who knows the formal and informal organization as well as the sources of power. Sources of conflict are many times pointed out by the internal consultant.

b. They serve as coordinators. Many OE workshops require considerable scheduling for interviews, training, and support facilities which can be arranged for by the internal consultant, freeing the OESO to direct attention to other areas.

c. They are familiar with the managers personality. It helps in many instances to receive an informal report from an internal consultant on the managerial style and pecularities.

d. Managers have more of a feeling of being in control. Experience has indicated that having an internal consultant performing coordination functions in support of OE workshops gives the managers more of a feeling of control and consequently reduces their personal threat level.

e. No additional spaces required. This is a very appealing advantage in these times of declining resources. Many jobs are cyclic in demands on a person's time and by careful scheduling some OE work can be programmed during the low cycle in work demand.

f. The number can vary according to workload. This has the advantage of the manager being able to select the number of people to be internal consultants according to anticipated use of OE. Where one agency chief may be content to have one internal consultant serve ten divisions, another one may need four consultants to serve eight divisions.

g. Responsiveness. This is an especially strong point since the internal consultant serves the most senior person in a staff section and consequently is made available to do OE work as directed by that section chief. This does occasionally generate some conflict which will be covered under disadvantages.

h. They serve as an information network for OE. They frequently serve as an informal communication network to get information out about things happening in OE. This must be in addition to formal channels rather than a replacement for the formal channels.

4. DISADVANTAGES. Some of the recognized disadvantages of having part-time internal consultants are:

a. Competition with their primary job. This is the greatest frustration experienced by the internal consultant. There are times when it appears that an internal consultant is available for an OE workshop and the schedule is firmed up only to later find out some crash project in the primary area of responsibility is demanding attention.

b. They may not be available at the time needed. Just as with any other part-time job, when it is in competition with the primary job for time, it is usually the part-time job which cannot be accommodated in times of conflict. Even though an agreement may be reached that a fixed percentage of time can be devoted to OE, there are supervisors who do not hesitate to assign additional work in the primary job when time starts being devoted to OE. This comes partially from the fact that the immediate supervisor in most cases is someone other than the staff section chief being served by the internal consultant.

c. They do not work well in their immediate organization. The point at which a person must be removed from their own organization in order to function effectively as a consultant seems to be outside their own division within HQ FORSCOM organization. Although this takes them beyond the influence of their rating officer, it has not generated any problems.

d. Little direct control over their assignment by OESO. While there is real control potential using the authority of the Office of the Chief of Staff, most control in practice is really through persuasion. A particular consultant is desired for a certain workshop and it is checked out directly with the IC. If this clears then a request for their service is made to their office chief. It is mostly a cooperative procedure based on individual personalities and has worked effectively.

e. Turnover of personnel requires periodic refresher training. As with any military organization, turnover causes peculiar problems. Present consultants have been in the program from four to twenty-nine months. The training problem that exists is to get everyone up to some minimum competency and maintain that level with personnel rotating periodically.

f. Time and money costs. Time away from the primary job by the part-time consultant is readily apparent but time devoted to management of the internal consultant network by the OESO is not quite as obvious. Money must be budgeted for TDY travel for professional development of the internal consultant and to bring external consultants into the organization to provide training for them. A professional library for their use is considered essential and must be funded for also.

5 SELECTION CRITERIA.

a. While there are no rigid, fixed selection criteria, there are some specific considerations which must be given to building an internal consultant team. What is the need within a particular part of the organization? This need is jointly determined by the OESO and the manager being served. It usually depends upon expected usage. A factor the OESO usually keeps in mind is a balance of grade, military/civilian, sex, age, etc., which is representative of the total work force.

b. Both military and civilian education are indicators of performance as well as past job experience but a more overriding factor is interest in the program and desire to serve as an internal consultant. Regardless of potential some internal consultants never find time to participate in anything because they lack motivation.

c. Availability and acceptability are also considered. A person should not be considered available if their primary job is requiring them to consistently work overtime. Acceptability is really a judgement call made by the OESO at the time of interview. How will the individual fit into the existing team of consultants? Since much OE work is done in groups, how would the person be accepted by most groups?

6. TRAINING. The basic philosophy of training for the internal consultants has been to use local resources to the extent practicable in order to keep costs down, but not to the point of impairing the effectiveness of training. General training needs of the total group are assessed and procured as a package by contract. In addition to the group training, professional development in a TDY status for individual workshops is scheduled on an as required basis depending upon the particular needs of the organization and the qualifications of the individual. Formal training conducted for the internal consultants is documented on a certificate and placed into the individual's personnel file. Participation by the internal consultants in determining annual training needs is considered important. The training plan for FY 79 developed in conjunction with the IC's and staffed formally throughout the Headquarters calls for a two-consecutive week basic course to get everyone exposed to the same material initially. In addition to this, a three day team building session and three specialized training workshops of three days each are programmed. Previous training consisted of one day per month plus a three day team building session each year.

7. UTILIZATION. The internal consultant serves as an extension of the HQ FORSCOM OE Office. FORSCOM Memorandum 1-4 authorizes each one to devote 25% of their time to OE activities. This includes training, preparation, and consulting. The amount of time actually devoted varies widely and depends to a large extent on the qualifications and initiative and/or interest of the individual. The internal consultants are used outside of their immediate organization in pairs so that a senior consultant is present who has been through the particular type OE activity before while the other one may be in a learning status. While the IC's may execute an OE activity independently, it is monitored by an OESO who has previously approved the plan. Responsibility for any OE workshop truly rests with the manager, but quality control of the design, methodology, and conduct must rest with the OE Project Officer.

8. PERFORMANCE REVIEW.

a. A need exists for the internal consultants to withdraw from the program and for the Project Officer to purge people from the program at times. In addition to this, there is a need for annual review of the past performance in order to plan for future development of the IC's.

b. The internal consultants participated in the development of an annual review procedure where each one selects a month in which to be reviewed at the beginning of the FY which coincides with the training year. This is expected to be in the month of their efficiency report or performance appraisal. A record of the review containing results of past performance as well as plans for development is kept in the OE Office. It is furnished to the immediate supervisor only on request of the internal consultant.

c. Some of the areas looked at during the appraisal are: attendance and participation in training, utilization within agency/office, briefings and marketing, diagnostic capabilities, OE activities within agency/office, rapport within agency/office and with supervisor, individual interest in the OE program, and individual and organizational plans.

9. INSTITUTIONALIZING. A key element in institutionalizing a part-time internal consultant program is to gain a commitment of the Commander and then the other key managers in the Headquarters. If it is to be successful, it must be viewed as their program and their internal consultants. After this is done, one must select the cadre in conjunction with the managers, train them, and then develop a publication outlining the organization and functions and follow this publication. One key factor to the success of the program has been a monthly meeting, formal or informal, of the internal consultants and their respective staff section chiefs to discuss OE. More initial contacts resulting in later OE workshops have come from the internal consultants than any other way. Some IC teams have developed annual OE plans for their agency chiefs, others have recognized a need for OE by being in the organization close to the problem and having the skills to recognize that OE may serve the manager.

10. PROFILE OF THE INTERNAL CONSULTANT.

a. An average internal consultant based upon data collected from 19 IC's would be a Captain, Major, or Sergeant First Class if military or GS 10/4 (5 to 13 range) if civilian, age 36, 37% female, completed 15.6 years of formal schooling, has attended 4 training workshops varying in length from 2 days to 60 days, has been assigned to the program 16 months and spends 12 percent of duty time on OE, 79% do not serve as an internal consultant directly for their rating officer, 53% volunteered to participate in the OE Program while the rest were selected and did not actively resist, and 10% would like to get out of the program without any adverse affect on their career.

b. Some examples of expressed satisfactions experienced by the internal consultants are:

- Personal development.
- Recognition with the agency.
- Successful OE workshops.
- Learning more.
- Meeting a wide variety of people.
- Observing changes resulting from the program.
- Assisting in increasing efficiency within an organization.
- Working in human relations.
- Personal growth.
- Improving job satisfaction and quality of life.
- Knowing that I am working to help people.
- A pleasant "shift in gears" from my primary job.
- Thoroughly enjoy OE work (clients & consultants).

c. Some examples of frustrations experienced by the internal consultants are:

- Some "lip-service" to OE by agency chief.
- Inability to get some people to use OE where it is needed.
- Difficulty in maintaining objectivity.
- Seeing how well a job could be done but isn't.
- OE competing for time with my primary job.
- Insufficient time to attend training.
- Feeling that program is becoming "just another program".
- Time required to effect needed change.
- Inability of people to understand that OE can help.
- The Chief is still confused about OE, EEO and routing grievance system.
- Not being able to "sell" the program to the crusty types.
- Too many petty gripes.
- Not being rated on OE work.
- Lack of support from supervisor.
- Negative attitude prevalent among people who have most to gain.
- All of the "petty" problems brought to me because I am an internal consultant.
- Not having sufficient expertise to know what to do in a real world situation.
- It is more than part-time duty, it is additional duty resulting in 125% performance.

d. Some examples of things occurring in the internal OE program which should be discontinued are:

- Poor attendance at training.
- Attempting to give the IC's the broad picture of OE.

- Too much training and not enough consulting.
- Forcing people to be IC's if they have neither aptitude nor inclination.
- Monthly one day training sessions.
- I am satisfied with it.
- None.
- Would prefer two days training every other month.
- Permitting people to remain in the program when they have no desire to.
- Inequities of IC's involvement. A standard few do all the work.

e. Some examples of things the IC's would like to see continued in the program are:

- Training.
- Being supportive (OE Office).
- Use IC's in staff offices other than their own.
- Evaluation of IC's in their OE function.
- Positive leadership from OE Office.
- Problem resolution within their respective staff offices.
- Awarding training certificates.
- Good accessibility to OESO.
- Provide opportunity for professional development in TDY status.
- Providing opportunities to put OE training to use within the Headquarters.

f. Some examples of things the IC's would like to see initiated are:

- Quality control of internal consultants.
- Defining our training requirement and our ultimate role in the scope of the OE project at HQ FORSCOM.
- More emphasis on problem solving.
- A careful but real attempt to find opportunities for "younger" IC's to observe real OE interventions as an extension of classroom training.
- Encouraging full-time OE spaces.
- Consider full time OE consultant for each agency.
- Implement selection criteria for OE internal consultants.
- Develop and provide a core OE course patterned after OETC for internal consultants.
- Feel we need some kind of HQ FORSCOM OE Bulletin or letter to inform the "workers" of what has been accomplished.

g. Some examples of expressed needs for more training were:

- Diagnosis.
- Observing groups & identifying behaviors.
- Team building.
- Group dynamics.

- Transition model.
- Role playing.
- Inter-group dynamics
- Leadership styles.
- Conflict resolution.
- Problem solving.
- Consultation training.
- Action planning and implementation
- Conducting meetings.
- Encounter practices.
- Male/female issues.
- Time management.
- Communication skills.
- Motivation skills.
- Skills to evaluate verbal and nonverbal communications.
- Assertiveness.
- Process observation.
- Contracting for OE.

h. Types of OE activities which the IC's have been involved in are:

- Training.
- Briefings.
- Marketing.
- Interviewing (private and group).
- Feedback.
- Transition workshop.
- Problem solving workshop.
- Sensing sessions.
- Management training.
- Survey administration.
- Developing agency wide annual OE plan.
- Data analysis.
- Conference facilitator.
- Team building.
- Survey design.
- Entrance interview and contracting.
- Effective listening training.
- Job redesign.
- Functional alignment workshops.

11. CONCLUSIONS.

a. The part-time internal consultant program has been successful at HQ FORSCOM.

b. Training is essential to success of an internal consultant program.

c. Support from the key managers is necessary.

d. Involvement by the internal consultants and their managers in all matters pertaining to use of their time has contributed positively to program success.

e. The internal consultant serves as a key link in the marketing chain.

FEEDBACK FORUM

MAJ Peter B. Dulcamara
OESO, 1st IDF

I held a Stress Workshop and received very positive feedback from attendees (40 officers and 10 wives).

WORKSHOP OUTLINE

Materials: TV Tape, "Stress", pencil & paper for all attendees, Music Tape - Drums of Passion and Mystic Moods.

Time: 1½ - 2 hours

INTRODUCTION

I. What I want to do this afternoon is provide the opportunity for you to think about yourselves.

The TV tape is about 45 minutes long. During the presentation, I will stop the tape twice and ask you to think about yourself for a few minutes.
- 1st break I asked them to identify three personal stressors and write them down. I also asked them to be aware of their individual physical reactions to the stressors and write down what they were feeling. I told them the information was for their use and they did not have to share it with anyone else.

- 2d break - I asked them to select a partner and share as much of the personal information (above) that each individual wanted to discuss with that partner. (Discussions were active and interest high). I then demonstrated the elbow writing and opportunity for group participation.

At the conclusion of the TV tape, I suggested we take some time and talk about the presentation.

At this point about 1½ hours will have passed. I would then like to take time for you to experience three additional stress recovery techniques. Each technique will take about 15 minutes.

NOTE: When this point is reached, contract with audience.

II. The tape has a few parts that are poor quality and several of the charts shown will be difficult for those in the back of the room to read. The Colonel presenting the lecture explains all of the important data. Try not to concern yourself with the charts.

"LISTEN"

III. Close your eyes and relax - listen to the music (Mystic Moods) when you are ready open your eyes and I will begin the TV tape.

COMMENTS:

The above went as described, began at 1330 in the Officers Club (location could not be observed by outsiders) and due to discussion and interest did not end until 1630.

At 1630 I contracted for additional time with anyone wanting to stay (the decision to remain or leave was theirs). Most of the younger officers departed. All husband and wife pairs remained plus five single officers (total 25).

All participated in the forehead massage, breathing and the tunnel. After completing these, participants began a discussion which I facilitated. I terminated the workshop at 1845. High interest in further discussion from all wives. "Drums of Passion" was used during these three recovery techniques. Reaction to music effectiveness was mixed.

LESSONS LEARNED:

Confessions of an Organizational Change Agent Revisited

Daniel F. Carroll
USAEUR

As I approach the completion of my first year in the field as an OESO, I feel an urge to reflect on some of the perceptions and concerns I have had and share some of the lessons I have learned. I also remember the anxiety I had while in OESOC wondering what laid in store for me out in the "real world." Therefore, I feel I have a responsibility to those enroute to "the field" to tell you how it is where I am. Since my entire tenure has been as the sole OESO in a Combat Arms unit in Germany, all the lessons I am passing on reflect that environment and may not apply anywhere else in the world. However, for those headed this way:

1. E-7, 8s &9s, WOs, CPTs and MAJs in combat arms units are generally a very conservative lot. Even a low risk self-introduction or Peter-Paul method seem to be high threats to these individuals. Lesson: OESOs need to be sure they understand the group they are working with so as not to "lose" and individual forever because the ante was too high at the beginning.

2. Some commanders have no desire for involvement with OE. It seems they believe their superiors will see it as a sign of weakness and that they need to get an OESO to "help them run the unit." Eventually, most of them come around after their counterparts appear to be "making money" by using OE. Lesson: Keep it voluntary; don't force it on anybody; don't oversell it; don't feel hurt if someone tells you "don't call me, I'll call you." Sooner or later he/she will!

3. When commanders call and request assistance from the OESO, they do not expect to have to wait several months before you can fit them into your already overworked schedule; they are ready now. In USAEUR, a unit may only have a couple of weeks of slack time between Major Training Area visits, AGIs, NSIs, METTs, etc., and it is therefore, not realistic to expect to be able to conduct a complete four-step process, battalion-wide, in that period. There just isn't enough time. Lesson: Keep your interventions short and return more often. This cuts down the waiting time for a visit from the OESO and fits better with the schedule of USAEUR units.

4. Commanders in combat arms units generally consider a four-hour group session as "lengthy." Do not realistically expect to conduct a three-day transition model. Even a day-long group session is a rarity. In some cases it can be done, but don't expect it. Lesson: You will be more widely accepted and welcomed if you can keep it short!

5. As a "lone OESO," most of my efforts are done by myself to include facilitating group sessions. Besides being very taxing physically and emotionally, it is difficult if not impossible (depending on the group, size, etc.) to process anything while performing the tasks of maintaining, intervening and pacing a session to insure you are somewhere near your time schedule. Not only is an individual's (or a group's) personal development and professional growth lessened, but so is the OESOs. Lesson: If at all possible, find a "qualified" individual (preferably another OESO) to co-facilitate group sessions with you. Don't try it alone unless there is no other way!

6. I conducted a four-hour Transition Workshop which included all E7s and above in the battalion as participants. Despite the lopsided ratio (31 participants and one OESO) it was a smashing success. The Battalion Commander wanted to include NCOs and junior officers to make them feel he wanted and needed their whole-hearted support right from the beginning of his term of command. This feeling was conveyed and the NCOs and Jr. Officers are now prepared to back him completely because he included them from the beginning. He also listened. Result--a large team building session occurred. Lesson a. Don't automatically exclude anyone. b. Be flexible in your designs. c. Transition meetings with large groups <u>can</u> succeed.

7. GOQs

a. Computer support here is virtually non-existent and very impractical at best (3 hours away). I spent days hand scoring a "Quality of Life Survey" before I redesigned my survey to fit a smaller survey program in the computer. It only gives a mean score for each of 44 questions, and I have to punch the data cards myself, but I can have results in less than a week rather than the month it takes otherwise. Lesson: OETC should give more instruction to students on how to construct their own questionnaires and how to hand score them if necessary.

b. Many of the GOQ statements are written above the comprehension level of the soldiers who are asked to respond. For example, phrases such as work priorities, meaningful objectives, adequate information, sense of accomplishment, performance evaluations and high emphasis are not part of the vocabulary for a great many soldiers (and that's only the first 15!). I spend more time redefining these phrases in "soldier" language than it requires to take the GOQ. Lesson: Write your survey using "soldier" language and try it out on a random test sample before going final.

8. I mailed my OESOC material (handouts, books, everything) from Fort Ord to Germany to reduce my hold baggage weight. After ten months, I am still waiting for them to arrive. In my haste to depart on leave from Fort Ord, I did not insure the box either! I have since replenished most of my material bit by bit and have a library adequate for my needs. But for the first two and one-half months I had nothing except myself

and my OESOC diploma. But, I have met with success almost every place I have been. Lesson: I didn't need a little kit bag to carry with me. OETC taught me everything I needed to "practice OE." The references only make me feel more secure (and I still don't use many of them).

I hope I have not painted a grim picture of the real world as I see it, in Germany, because it is not. I have never felt as rewarded in my whole life as I have working as an OESO this past year. Approaching the completion of only my first year, I feel confident and competent enough to stand with Pfeiffer, Jones, French, and Bell or any others and discuss the state of the art. I attribute that confidence to my training and my employment. I do get lonely by myself, but the work keeps me busy enough so that I do not have time to dwell on it. In a phrase: If I had it to do all over again, I'd do it sooner.

P.S. One more lesson: Insure your reference material if you mail it. It's easier to trace.

COMMUNIQUE TEAR OUT SHEETS

"Make it pragmatic. It must contain information--workshops--ideas--articles that OESO's 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 OESO's, 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 OESO's. 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 OESO's. OESO's 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

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OE Communique
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Tear out #1

SUBJECT: OE/OESO Efforts Updated

Editor
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Tear out #2

SUBJECT: OE Lessons Learned

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Tear out #3

ARTICLES OF INTEREST

SOME THOUGHTS ON OE RATING SCHEMES

CPT John Kendrick
HQ V Corps

Recently, my partner, LTC Jim Berg, and I were informed by our headquarters that consideration was being given to revising our OER rating scheme. We were asked to react to that and respond. We brainstormed the advantages and disadvantages of our current scheme and the proposed rating scheme and came up with the thoughts expressed below. It is our hope that they might be useful to you and that perhaps you might be able to add to them and share your input with us.

Here is some background information on our environment. We work on a Corps level staff which has had OE on board since October 1976. Right now there are two of us but by January there will be four; the authorized spaces are one major and three captains.

Our current rating scheme has us rated by the G1 and indorsed by the Chief of Staff. Following is a list of advantages and disadvantages we see for this rating scheme.

ADVANTAGES

1. G1 AND CHIEF OF STAFF WILL BE BETTER OE MANAGERS. Since they are responsible for rating all the OESOs they must closely monitor all OE activities. This necessitates active participation in the OE effort.

2. PROVIDES PERCEIVED COMMAND GROUP SUPPORT OF OE. The published rating scheme of a corps level HQ is interesting reading material for many people. Particular note is often made of who is rated by the command group.

3. INSURES OESO VISIBILITY WITH COMMAND GROUP. The Chief of Staff is a link to keep the command group thinking in terms of how it might best use OESOs.

4. PROVIDES STABILITY IN RATING SCHEME. The G1 does not change frequently enough to require more than an annual and a PCS rating for most OESOs during their utilization tour.

5. PERMITS TRUST AND OPENNESS AMONG OESOs. As "enlightened" as we may be, there will always be a shorter limit of trust and openness between a subordinate and a supervisor than between two partners. This rating scheme allows for maximum potential of trust and openness.

DISADVANTAGES

1. PERSON MOST KNOWLEDGEABLE IN DAY-TO-DAY MANNER OF PERFORMANCE IS NOT IN RATING SCHEME. A fellow OESO should, in most cases, be more aware of what one is, isn't, or could be doing than an OE manager who is less familiar with our capabilities.

2. <u>REQURES CONTINUING UPDATE FOR RATER AND INDORSER</u>. This is a very difficult task to accomplish because of the nature of our business. Some of our attempts to keep the OE managers informed include: periodic briefings on trends within the corps; monthly update of each OESO's activities (within constraints imposed by anonymity and confidentiality requirements); pass on feedback received from OE users; insure the OE managers see letters of appreciation received; provide edited summaries of the results of evaluation and follow-up conducted by OESOs (Step 4 of FOUR STEP PROCESS). These methods require additional time and effort by both the OE managers and the OESOs which none can easily afford to spare.

3. <u>REQUIRES COMMAND GROUP (CHIEF OF STAFF) TO INDORSE OER</u>. There is an effort to reduce the 140+ OERs that are taking up much of the Chief of Staff's time.

The proposed rating scheme is that the senior OESO would be rated by the G1 and indorsed by the Chief of Staff. The other three OESOs would be rated by the senior OESO, indorsed by the G1, and reviewed by the Chief of Staff. Following is a list of the advantages and disadvantages for this rating scheme.

<u>ADVANTAGES</u>

1. <u>DISADVANTAGES OF CURRENT RATING SCHEME WOULD BE ADVANTAGES OF THE PROPOSED SCHEME</u>. The person most knowledgeable in the day-to-day manner of performance of the OESOs would be in the rating scheme. A continuing update would no longer be required for the OE managers. The Chief of Staff would no longer have to rate four OESOs, only one.

2. <u>MORE FREQUENT RATINGS</u>. This could actually be either positive or negative depending upon the individual needs of each rated officer.

3. <u>CHANGES CHIEF OF STAFF FROM INDORSER TO REVIEWER</u>. This would reduce his OER workload.

<u>DISADVANTAGES</u>

1. <u>ADVANTAGES OF CURRENT RATING SCHEME WOULD BE DISADVANTAGES OF THE PROPOSED SCHEME</u>. The G1 and Chief of Staff would not be as informed as OE managers. There would be a perceived de-emphasis of Command Group support. OESO visibility within the Command Group would be diminished. There would be less stability in the rating scheme (I, for example, would be rated four times by four different people in 18 months). Trust and openness could possibly be hampered by a supervisor/subordinate relationship.

2. <u>REPLACEMENT SYSTEM DOES NOT TAKE INTO ACCOUNT AN OE CHIEF</u>. Although one of the four of us will always be senior, when the senior person leaves, the replacement will not always be identified as an OE chief.

3. LEAST EXPERIENCED OESO COULD BECOME THE OE CHIEF (RATER). Being a new OESO can be rather awesome. It can be even more awesome to start out as an OESO and have the increased burden of trying to manage and rate the efforts of more experienced OESOs.

4. DIFFERENT OESO PHILOSOPHY/STYLE MAY CAUSE CONFLICT IN RATING. We all have our own styles and philosophies of OE. If an OESO and his rater differ radically there is a potential for those differences to impact on how the rater views the subordinate. If we are all on an equal basis, those differences are more apt to lead to growth than to conflict.

The decision has not been made yet in this headquarters concerning our rating scheme. It should be clear, however, that we feel strongly that OESOs should not rate each other and that the rating scheme should be as high up the chain of command as possible. This position may conceivably be at personal expense. If OE managers are not actively involved in OE, (eg. a G1 or Chief of Staff) their ratings may not be as enthusiastic as those of someone who is deeply involved in the program. We believe, though, that it is necessary for OESOs to remain equal to foster creativeness and for the command group at any level to be actively involved to give OE the support it needs to help the Army.

ESTABLISHING A CONSULTING AGREEMENT

Jack W. Collier, PhD
HQ FORSCOM

Organizational Effectiveness is usually referred to as a four-step process, but before the first step is ever made there is some preparation which occurs. If this preparation is not systematic and complete, all the remaining work could be in jeopardy. It all starts with some scouting which results in target identification. This target is a potential OE user so a meeting is arranged to discuss the possible use of OE. Since a consulting agreement may come out of this meeting, it is necessary to think in terms of its important elements prior to the meeting.

A mutual understanding of what is to be accomplished in OE consulting is central to success or failure. It is important that content issues be pinned down as much as practicable but still leaving it open to essential changes. An understanding of this nature is just as important for the internal consultant/client relationship as it is for the external consultant/client relationship.

The understanding between the OESO and the user could take any of a number of formats. It could be a letter, a memorandum, or an agreement as in the inclosed sample. The attached consulting agreement is a sample of a type of agreement which may be entered into by an OESO and an OE user. Paragraph 2 contains the essential elements of an agreement as indicated by the underlined portions. That part which is contained in parenthesis will vary depending on the type of OE operations anticipated and the type of user (command, staff, etc.)

All or any portions of topics contained in the attached sample may be in the final consulting agreement, but these items should be helpful as a guide for conducting the initial meeting with the user. Frequently, it is beneficial to follow the topical outline during the meeting then send a memorandum back to the user summarizing the results of the meeting. Such a memorandum would then serve as a consulting agreement.

SAMPLE CONSULTING AGREEMENT

1. We the undersigned agree that while this document is not a formal contract and is not considered binding on either party, it will serve to focus attention on expectations and clarify steps that will be involved in the Organizational Effectiveness (OE) process. This paper is an initial understanding and will be modified as necessary during the course of the work agreed upon.

2. The following areas are clarified or defined to provide a common understanding.

a. Statement of the problem or need. (The OE user needs consulting services to determine the individual and organizational needs within the organization and develop a strategy to deal with these needs).

b. User. (The user is the HQ FORSCOM DCS _______).

c. Coordinator. (The coordinator will be the DCS __________ internal consultant).

d. Consultant. (The consultant will be the HQ FORSCOM OE Project Officer).

e. Role relationship. (The user is the sole decision-maker for any changes resulting from this OE project. The consultant makes recommendations and provides appropriate information to the user, but management responsibility for the work remains with the user).

f. Openness pact. (The user and the consultant agree to be honest, open, and candid with each other. An exchange of bad as well as good news is expected).

g. Sharing strategy. (The OE work must be one of sharing information. The consultant will keep the user informed of planned activities and the user will keep the consultant informed of other activities which may conflict with or impact on the OE Project).

h. Objectives. (To provide the user with a better understanding of the peoples' attitudes. To improve communications vertically and horizontally. To establish a more open climate. To improve job satisfaction).

i. Tasks. (Conduct personal interviews with all division chiefs, __________, and DCS ________. Conduct nine group interviews of 10 persons each lasting one and one-half hours consisting of randomly selected persons in each organizational entity reporting directly to the DCS _____________. Develop and administer a climate survey to all members of the organization. Consultant will analyze the information and provide feedback to the division/office chief. Division/office chiefs then feeds back to division members.

Consultant will recommend future action to the user based on the data. General trend data is presented to the DCS _________ by the consultant followed by action-planning with him and division chiefs).

j. Predicted results. (It is anticipated that some of the data obtained will be negative and some will be positive. It could show dissatisfaction with rewards system, communication system, clarity of functions and organizational ambiguity; a better understanding of peoples' attitudes will prevail, the organizational climate will be more open, and job satisfaction will be improved).

k. Results measurement. (The results of the effort will be measured by the subjective judgements of the division chiefs and the DCS ______. No other measure will be made until some actions are taken as a result of the data).

l. User System. (The total population of DCS _________).

m. Commitment test. (Personnel will be made available to the consultant as requested to facilitate the collection of data).

n. Relationship control. (The DCS _____ will approve all phases of the effort and commitment of resources to the project. Either party reserves the right to terminate the project at any time that it appears to be in the best interest of either).

o. Reports. (The DCS _____ will publish an after-action report or memorandum for record summarizing the key results of the OE Project for distribution to all personnel of DCS ________).

p. Evaluation of project. (An immediate reaction evaluation will be made by the OE Project Officer at the completion of each activity. The DCS ________ and the OE Officer will make a joint evaluation at the conclusion of the feedback sessions).

q. Projected future activities. (Based upon the feedback information and the joint evaluation the DCS _______ will give consideration to future OE activities. The consultant will suggest alternatives and the user will determine appropriate course of action).

r. Follow-up. (The OE Office will conduct follow-up interviews after six months to determine conditions at that time).

BRIGADE PLANNING/COORDINATION CONFERENCE

MAJ Walter R. Vlasak
CPT David J. Prybyla
Ft Lewis, WA

"Do you want to know your men as quickly as possible?"
"Do you want your men to know you as quickly as possible?"
"Do you want to find out as quickly as possible what is going on in your unit?"

These are the questions a particular brigade commander would ask if the question were posed to him, "Was your Brigade Planning/Coordination Conference worthwhile?"

One week prior to assuming command of his brigade, the command designee approached the local OESO office with a request for assistance in easing the customary turmoil associated with changes of command. His interest had been piqued through discussions with commanders who had used something called a "transition meeting" and had convinced him that this meeting would bring him abreast of his units' current issues and personalities of his subordinates, thereby saving him an estimated 3 to 4 months of work. The outgoing commander was not going to be present.

The clarity of the commander's objectives for the meeting was established during the initial interview and was paramount for the design of the conference. These objectives were:

a. I want to see how my people operate.

b. I want this to be a one-day session.

c. I look at this as a way for them (commanders, staff, and CSMs) to get information to me.

Being an old infantryman, the words "transition meeting" did not have a professional ring to them. "I want something that fits more with what we are doing," so the name was changed to: Brigade Planning/Coordination Conference.

A second meeting was held three days later. For this meeting, the OESOs prepared two designs for consideration. The design selected by the commander followed the general sequence presented by LTCs Pike and Looram in the OE Communique, October, 1977, with major modifications in content. The meeting would take one day, commencing with a participant breakfast at 0630 and ending in the vicinity of 2100 hours.

In selecting the one-day design, the commander fully understood there would be only limited time to do action planning. His primary purpose was to expose himself to the personalities, issues, concerns, and expectations of subordinate commanders and staff as stated in his objectives; and, that although action planning was included, there could be no real expectation that many issues would be resolved.

To assist him in achieving success, a letter explaining the purpose of the conference, with two inclosures, was prepared for his signature (Appendix 1). The inclosures included pre-conference preparation by the participants, a copy of the day's agenda, and a pre-conference evaluation questionnaire.

THE DESIGN:

0630-0745	Breakfast
0800-0830	Introduction by Brigade Commander
0830-0930	Participant introductions
0930-1100	What issues should the Brigade Commander be aware of to maintain or improve the effectiveness of his Brigade?
1100-1200	Presentation of issues to Brigade Commander
1200-1300	Lunch
1300-1600	Action plan selected issues
1600-1730	Presentation of action plans
1730-1830	What the participants need from the Brigade Commander in order to maintain or improve their effectiveness on the job
1830-1930	What you can expect from me, the Brigade Commander, and closing comments

0630-0745: BREAKFAST

0800-0830: BRIGADE COMMANDER INTRODUCES PLANNING/COORDINATION CONFERENCE

DISCUSSION: The success of the meeting was highly dependent upon what the commander said in his introduction (normally, the OESO would prepare and suggest opening remarks and coach the commander). In this case, the commander had a clear understanding of his objectives; his candor and sincerity were evident; and, above all, his commitment to the conference was total. His opening remarks highlighted these necessary elements, established the tone of the conference, and legitimized the OESOs presence.

0830-0930: INTRODUCTIONS

DISCUSSION: For a traditional, 30-year infantry soldier the structured exercises "My chief strengths as a person are; my chief limitation as a person is" did not fit. Therefore, the opening exercise was changed as follows:

"The one thing I would like to achieve as a result of this conference is..."

"The one thing I would like to avoid as a result of this conference is..."

"The one thing that yanks my chain the most during the duty day is..."

The answers to these questions gave the commander an insight into what the day was going to be like and served as an opening for the participants to begin the conference.

0930-1100: WHAT ISSUES SHOULD THE BRIGADE COMMANDER BE AWARE OF TO MAINTAIN OR IMPROVE THE EFFECTIVENESS OF HIS BRIGADE?

DISCUSSION: Four subgroups were formed around the following participants: commanders subgroup, primary staff subgroup, special staff subgroup, and CSMs and Brigade S-3 SGM subgroup. There seem to be varying schools of thought as to what should be the first area to be addressed; some say goals and priorities, others say issues and concerns. For this conference, issues and concerns were selected for a variety of reasons. First, this conference was the first interface for many of the participants. Second, there was bound to be more commonality around issues and concerns (units and staff have different priorities and objectives to attain like goals). We also thought that issues and concerns usually center around what is preventing them from achieving their goals and priorities. Third, a one-day conference might not allow enough time for participants and subgroups to reach consensus on prioritization of their goals.

During this period, the Brigade Commander and XO floated from group to group. The Brigade Commander had been coached not to offer any comments or ask any questions of the work groups. The Brigade Commander was to direct any questions for clarification to the XO and not the work group themselves. This process allowed the Brigade Commander to accomplish one of his objectives in that "This is a way for them to get information to me." This also allowed the Brigade Commander to "get to know his men" by seeing their reaction to the different types of issues, and thereby helping him to formulate some preliminary ideas in dealing with each person in similar situations in the future.

1100-1200: PRESENTATION OF ISSUES TO BRIGADE COMMANDER

DISCUSSION: Due to both the limited time available to surface issues, and the fact that each individual member of the subgroup had his ideas as to the priority of issues, it was determined that the lists presented by the subgroups to the commander should not be prioritized (the discussion surrounding prioritization of the issues would have detracted from accomplishing the stated objective of "to have a way for them to get information to me)." In this case, the Brigade Commander was going to select from each list those items he wanted action planned. In effect, the Brigade Commander, through his selection, was stating to the participants: "This is where some of my priorities lie." (The decision by a commander as to which items are to be action planned should not be made immediately after the presentations. It is appropriate to break and allow the commander time to look at the lists and confer on the items he will select. He may combine some issues where there are similarities and he can place on a back burner those items on which he does not want recommendations at this time. An additional benefit of doing this during a break is that it provides the OESO with time to check with the commander as to his process observations made of the various subgroups). In this case, the Brigade Commander was cognizant of the competency levels of each subgroup and was able to assign 2 to 4 tasks to each group. (If the commander had not had this high level of awareness it would have been appropriate for the OESO to have offered some process observations and assist him in determining the number of tasks each subgroup could handle in a credible manner).

1200-1300: LUNCH

1300-1600: ACTION PLAN SELECTED ISSUES

DISCUSSION: The Brigade Commander notified each subgroup which issues had been selected for action planning and gave his guidance regarding each issue. Prior to the subgroups beginning their action planning, the OESO distributed two recommended formats which could be used as a guide to action planning. This helped stimulate in their minds that a briefing format was necessary in the formulation of a good plan. Also, at this point, the OESO emphasized the fact that there were many available assets within the room. The OESO pointed out that each subgroup should not be restricted to the assets within their particular subgroup, but should actively cross subgroup lines to clarify ideas and gain the necessary information needed for a coordinated plan or recommendation. While the subgroups were action planning, the Brigade Commander and XO moved along the groups. This time, however, they interjected comments and suggestions to assist the groups in formulating their action plans.
(OESOs should monitor this phase very carefully and advise the commander as appropriate, so that the action plans do not become the action plans of the commander, but the plans of the subgroup as intended).

1600-1730: PRESENTATION OF ACTION PLANS

DISCUSSION: Action plans were presented to the Brigade Commander. (At this point it is essential that the commander understand that he makes no decisions unless he is completely confident that it is appropriate. It should be explained that a common mistake commander's make is that they feel compelled to make a decision, on the spot, for a plan that is rational, well thought out, and appears to have possibility for a marked payoff. Some decisions, regardless of their good intentions, may be in violation of policies of higher headquarters. It is best that the commander state at the outset that he will not make any decisions during the meeting. He will study the action plans and other issues, possibly seek further information from the participants, and on a future date, he will respond in detail as to his decisions. It should be emphasized that "staff's solve problems, commander's make decisions)."

1730-1830: WHAT THE PARTICIPANTS NEED FROM THE BRIGADE COMMANDER IN ORDER TO MAINTAIN OR IMPROVE THEIR EFFECTIVENESS ON THE JOB

DISCUSSION: This period of time was originally intended to be the supper break with a discussion of participant's priorities to follow. However, it was the perception of the Brigade Commander, with the concurrence of the OESOs, that the issues presented had centered around their existing common priorities. This was attributed to the fact that the majority of the participants had done a great deal of preliminary work before the conference. It was also noted that the energy level of the participants was beginning to wane. Considering that they had been together for 11 hours, and looking at what had been accomplished, the Brigade Commander asked the OESOs whether or not the next step was necessary. The commander concluded that what had been presented thus far centered around their common priorities and any further pursuit would result in a rehash of what had already been accomplished. He also stated that based on his objectives he was more than satisfied with the results achieved. The only thing he needed from the participants at that point was, "What do you need from me in order to maintain or improve your effectiveness on the job?" Whether or not to continue through the supper hour was posed to the participants, and it was unanimously decided to "press on". (The OESOs need to maintain flexibility and be prepared to make adjustments to the needs of the commander and participants).

1830-1930: WHAT YOU CAN EXPECT FROM THE BRIGADE COMMANDER AND CLOSING COMMENTS

DISCUSSION: Upon completion of the participants' relaying their expectations of the Brigade Commander to him, he elucidated his expectations of the Brigade Commander to him, he elucidated his expectations of the participants and what they could expect of him in return. One responsibility subordinates have is to learn how to manage their boss in order to get what the boss can provide to help accomplish the task. (The success of this juncture is based on candor and specificity. There can be no room for misinterpreting the words of the commander). In this case, the Brigade Commander set the stage by beginning with, "Be sure my instructions are clear and concise; ask for clarification if you need it. I need to have facts, not emotions or gut feelings; I need the facts to take up the chain to get help. I will be flexible in my approach and attitude with you; I will give you running room."

Remarks such as these were followed by his closing comments. These centered around the worth of the day's activities and his belief that the amount of time expended could only bring dividends to the Brigade.

To assist the OESO in determining the perceived worth of the Planning/Coordination Conference, pre- (Appendix 2) and post- (Appendix 3) conference questionnaires were prepared. The pre-conference questionnaire was distributed with the conference letter with instructions to have the questionnaire completed before the conference and to place the questionnaire in a box provided at the start of the conference.

As expected, the results of the pre-conference questionnaire were positive; however, comments by participants before and during the initial part of the conference showed a great deal of skepticism. The post-conference questionnaires, which are not complete, are exhibiting a high degree of confidence that the conference objectives had been met and that a shorter follow-up conference should be conducted to talk about what mid-course corrections should be made. The commander was very amenable to these suggestions and a follow-up conference is currently being planned.

It should be noted that the design presented as an inclosure to the Commander's letter was modified during the conference, emphasizing the need for flexibility by the OESO to meet the needs of the Commander and the participants. By focusing on the established objectives during the design and conduct of the session it was much easier to better meet the needs of the Commander and evaluate the success of the conference.

3 Appendicies
1. Letter
2. Pre-Conference Questionnaire
3. Post-Conference Questionnaire

XXXX-YY

SUBJECT: Brigade Planning/Coordination Conference

SEE DISTRIBUTION

1. A Brigade Planning/Coordination Conference will be conducted on ________ from ________ to approximately ______ in the ____________.

2. The purpose of this meeting is to find out as quickly as possible where we are now, where we are going, and how we are going to get there.

3. Proposed Agenda:

a. To get acquainted.

b. Identification of issues.

c. Action planning on selected issues.

d. Individual and common priorities.

e. What do you need from me to do your job.

4. It should be clear that this meeting is focused on management issues. It is not designed to produce interpersonal closeness, nor at blaming others for difficulties; rather, it is an opportunity to identify, discuss, and remedy issues at hand in a straightforward manner.

2 Incl
1. Conf Preparation
2. Conf Agenda

COL, IN
Commanding

DISTRIBUTION:
(1) Bde XO
(1) Bde CSM
(1) ea Bde Staff Officer
(1) ea Bn Cdr
(1) ea Bn CSM
(1) ea Special Staff
(1) S3 SGM

CF:
ADC(O)
CofS

APPENDIX 1

BRIGADE PLANNING/COORDINATION CONFERENCE PREPARATION

1. In preparation for the Brigade Planning/Coordination Conference, you should think through your individual positions and beliefs on the issues you wish to address or expect others to address. It may be appropriate to talk to other members of your unit/staff to help cement the issues to be addressed. To expedite discussion and presentation, it may be helpful for you to prepare brief notes on the following:

a. Your concerns about this conference.

b. The priorities of your unit/staff.

c. Actions necessary to make these priorities a reality.

d. Anticipated problems in achieving these priorities, with whom, and over what issues.

e. Finally, one responsibility each subordinate has is to learn how to manage his boss in order to get whatever the boss can provide that helps get the job done. Consequently, you should give some thought to what you need from the commander in order to maintain or improve your effectiveness.

2. As a final note, you should come mentally prepared to take part in the conference and discuss your ideas in an open and candid manner.

CONFERENCE AGENDA

0800-0830 Commander introduces the Brigade Planning/Coordination Conference.

0830-0900 GET ACQUAINTED ACTIVITY

(1) The one thing I would like to achieve as a result of this conference is ______________________________
____
____

(2) The one thing I would like to avoid as a result of the conference is ______________________________
____
____

(3) The one thing that yanks my chain the most during the duty day is ______________________________
____
____

0900-1030 SUBGROUPS (Cdr's, Staff, CSM's)

What issues/concerns should the Commander be aware of in order to maintain or improve the effectiveness of his brigade?

1030-1115 SUBGROUPS REASSEMBLE

Subgroups reassemble into a large group and a spokesman from each subgroup presents his prioritized list to the Bde Cdr. The Bde Cdr selects an issue from each group list and provides guidance to the groups for action planning.

1115-1130 OESO (Action Planning)

1130-1200 ACTION PLANNING

1500-1530 SUBGROUPS REASSEMBLE

Subgroups reassemble into a large group and the spokesman from each subgroup presents the Action Plan to the Commander (limit the group presentations to 5 minutes).

1530-1600 PRIORITIES/CLARIFICATION

Commanders, staff, and CSMs individually list the priorities they seek to achieve in their organization and rank them.

1600-1700 SUBGROUPS REASSEMBLE

The subgroups now look at the individual priorities and consolidate their individual work into common priorities. Eliminate overlaps and state the priorities in as clear a way as possible.

1700-1900 SUPPER

1900-1930 PRESENTATION OF PRIORITIES

Presentation of priorities to the Commander. The subgroups reassemble into the large group and post their consolidated subgroup priorities on the wall.

1930-2030 Participants express their concerns about the new Commander; each participant has the opportunity to tell the Commander what he needs from the Commander to do his job; and each participant may indicate to the Commander those things he would like to know about him. EXAMPLE: "In order to maintain or improve my effectiveness on the job, I need the following from you........."

2030-2100 REMARKS BY BRIGADE COMMANDER

2100 FINAL REMARKS AND CLOSE BY BRIGADE COMMANDER

BRIGADE PLANNING/COORDINATION CONFERENCE QUESTIONNAIRE

Please respond candidly to this questionnaire. The information you provide forms the basis for future revisions of this conference. This is an anonymous evaluation.

1. As they are stated, how satisfied are you with the outcomes of the Brigade Planning/Coordination Conference?

VERY SATISFIED 1 2 3 4 5 VERY DISSATISFIED

2. The conference will help me understand/adjust more quickly to the new commander.

STRONGLY AGREE 1 2 3 4 5 STRONGLY DISAGREE

3. I will openly discuss my concerns at the conference.

STRONGLY AGREE 1 2 3 4 5 STRONGLY DISAGREE

4. The conference will result in the new commander having a better understanding of my unit/staff.

STRONGLY AGREE 1 2 3 4 5 STRONGLY DISAGREE

REMARKS (OPTIONAL):

APPENDIX 2

BRIGADE PLANNING/COORDINATION CONFERENCE QUESTIONNAIRE

Please respond candidly to this questionnaire. The information you provide forms the basis for future revisions of this conference. This is an anonymous evaluation.

1. How satisfied are you with the outcomes of the Brigade Planning/Coordination Conference?

VERY SATISFIED 1 2 3 4 5 VERY DISSATISFIED

2. The conference helped me understand/adjust more quickly to the new commander.

STRONGLY AGREE 1 2 3 4 5 STRONGLY DISAGREE

3. I openly discussed my concerns at the conference.

STRONGLY AGREE 1 2 3 4 5 STRONGLY DISAGREE

4. The conference resulted in the new commander having a better understanding of my unit/staff.

STRONGLY AGREE 1 2 3 4 5 STRONGLY DISAGREE

REMARKS (OPTIONAL):

BENEFIT ANALYSIS _ _

A RESOURCE MANAGEMENT TECHNIQUE

PREPARED BY:

ORGANIZATIONAL EFFECTIVENESS DIVISION
ODCSPER
HEADQUARTERS, DEPARTMENT OF THE ARMY

Submitted By:

Michael Plummer
LTC, GS
OE Division

Benefit Analysis - A Resource Management Technique

You don't have to be an OESO for very long to understand the concept that organizations will not change unless they feel pain. A lot of OESO time has been spent attempting to convince potential clients that they need OE in areas that the organization doesn't feel any pain. The result is usually wasted time or participation without commitment.

Recognizing when organizations are likely to feel pain gives the OESO leverage for an OE intervention because pain creates need. Pain is most often felt when problems exist or are created for which there are no policies or SOPs. These problems are normally associated with the introduction of new technology, reorganizations, planning involving complex coordination, changes of command or other key personnel, introduction of new programs or training and resource allocation.

Each one of these "pains" creates organizational "needs" that are felt by the commander and his staff. The OESO has several techniques that can be used by commanders in reducing their pain:

Introduction of New Technology
Complex Coordination → Action Planning Conferences
New Programs or Training
Resource Allocation

Changes of Key Personnel → Transition Models

Reorganizations → Transition Management

As the OESO demonstrates his effectiveness in helping the commander reduce his pain, other opportunities normally follow and the OESO is on the way to making a significant contribution to organizational effectiveness.

One organizational pain that is felt in all organizations is associated with resource allocations. Commanders at all levels are feeling the pain of not enough money, people, training, maintaining or time. This provides the OESO with an opportunity to demonstrate his organization's worth in an area that effects the entire command. It also provides the commander an opportunity to "need" the OESO which is a key step in institutionalization of OE.

The purpose of this article is to discuss a technique borrowed from the Operations Research/Systems Analysis (OR/SA) discipline that when combined with the interpersonal and group facilitation skills of the OESO, can be used by the OESO to assist the commander in reducing the pain associated with resource allocation. It is called Decision Analysis. An OR/SA definition would read:

DECISION ANALYSIS is NOT a substitute for clear thinking and seasoned judgment. Rather, its power and worth stem from the orderly and logical framework that it superimposes on the decision-making process. A time-tested decision-maker's tool - straightforward, intuitively appealing, and easily used - decision analysis forces a thorough, objective, and discriminating examination of all of the relevant factors bearing on an important decision.

It has been used in real-world decision problems involving strategic planning, negotiation, evaluation of alternatives, resource allocation, and futures assessment. The purpose of Decision Analysis is to establish a rigorous methodology to assist the decision maker in allocating resources. It is a quantitative procedure for the systematic evaluation of the alternatives available to a decision maker. The process defined as decision analysis is to decompose a decision problem into clearly defined components, so that all options, outcomes, values, and probabilities are depicted. While providing a recommended course of action, the explicit representation of the decision also facilitates communication among those involved. So, it should be emphasized that decision analysis does not replace decision makers but structures the role of wise human judgment in the decision process.

A recent application of decision analysis was the use of cost-benefit analysis to prioritize the PARR/POM. This process involved quantifying the relative benefits and costs of each issue. The benefits were judgmental assessments, obtained by first quantifying the relative benefits of programs within the areas of each sponsor (e.g., DCSOPS, DCSPER) and then determining the relative benefits of selected programs from each sponsor's list. Once the benefits were quantified, the decision units were priortitized from the most cost-beneficial. Until this technique was used, resource allocations and priorities were made almost always intuitively in the absence of a systematic and disciplined effort to assess the full impact of a decision on the entire system. The OESO added a new dimension by application of interpersonal/group facilitation skills. In the absence of these skills, hidden agendas (parocialism, private interest, power influence and other disruptive dynamics) are at work and get in the way of producing the best recommendations for the commander's decision.

The technique is based on the fact that subjective benefit assessments can be made for very diverse programs by an elicitation procedure that motivates the manager of a set of programs to provide his true subjective estimates. Psychologists and decision analysts have observed that the best way to obtain reliable quantifications of this sort is to use paired comparisons. That is, to ask the expert to make choices between two packages until points of indifference can be found. Our elicitation procedure begins with the quantification of benefits for sets of similar programs; each set having the same manager or sponsor who is an expert on their usefulness. Once these benefit scales have been assessed, each manager is asked to provide rationale for the benefit numbers attached to his programs.

The following example is an illustration of the process: Suppose there are ten possible programs proposed by the sponsor (in this case the DCSPER):

A, B, C, D, E, F, G, H, I, J

The first task is to rank order the programs according to their importance to the mission of the command. It is during this time that the OESO begins to identify hidden agendas that will have to be dealt with during the next phase and use his group facilitation skills to keep the participants focused on the mission. For an example, the group decides the following as a rank order:

Program	Program
1. B	6. A
2. D	7. C
3. F	8. H
4. G	9. I
5. J	10. E

The next step is to determine benefits of each program to the command. Benefits are UTILES in the sense that, that program, void of all other considerations (DOD directed, CG's pet project, already funded, etc.), makes a contribution to the accomplishment of the command's mission. Programs are assigned UTILES independent of each other and are in essence the best collective judgment of the group. For our purposes, the group arrived at the following UTILES (Fig 1) after a lot of discussion and compromise which is recorded for use in major issue papers:

Program	Utiles
B	100
D	90
F	80
G	70
J	60
A	50
C	40
H	30
I	20
E	10

Fig 1

Now the group must determine the relative values of each program dependent upon the other. The OESO as an honest broker would check the assigned value of the program utiles by asking the group to compare the utiles of the programs, i.e., is B twice as good as A? Is F twice as good as C. Is D three times as good as H, etc. Working to elicit value judgments from the group and at the same time forcing the issues surrounding each program to be laid on the table.

The next step of this process begins by comparing programs using the utile values previously assigned. In the example in Fig 2 the OESO, in his role as an honest broker, asks the group if they would accept programs A & C instead of D (both values are 90). If they do, then the utiles assigned are correct. If they wouldn't, then the OESO must determine how much greater than or less than 90 A & C is. He must also continue to expose the hidden agendas.

B	100
D	90
F	80
G	70
J	60
A	50
C	40
H	30
I	20
E	10

If A & C > 90 say 120, then all those programs above H must be plussed up by a factor of 120/90 (1.25) and if A & C < 90 say 60, then all those programs below A must be decreased by a factor of 2/3 (.66) (Fig. 3).

Fig 2

ATC = 120		A & C = 60	
Program	Utiles	Program	Utiles
B	125	B	100
D	112.5	D	80
F	100	F	70
G	87.5	G	60
J	75	J	50
A	62.5	A	33.3
C	50	C	28.3
H	30	H	20
I	20	I	13.3
E	10	E	6.6

Fig 3

These iterations are continued using various combinations of programs until the group is satisfied that the UTILES reflect the best judgment of the group. The scale is then normalized to stay in a 1-100 range and presented to the sponsor for his decision. The sponsor can elect to go with it as is or change the value of the utiles or even the rank order, but he will do so with the full knowledge of why the group valued as they did because the issue papers prepared as a result of the recorders notes should reflect the major pro's and con's for each program. Unless the commander has some information that he has not made available to the group, he will most likely buy the group's recommendations and we are ready for Phase II, which is the collapse of each sponsor's scale (DCSPER, DCSOPS, DCSLOG, DCSRM, etc.) into a single command scale. It is this cross sponsor elicitation of utiles that motivates each sponsor to provide a true utile estimate.

As an illustration of this cross-sponsor utile scaling, consider the following two-sponsor example, Each sponsor, 1 and 2, has four programs and has assigned utiles as shown in Figure 4. The cross-sponsor group is asked to compare "B" and "O" and decides that "O" is twice as beneficial as "B" (Figure 4). (Typically, there are eight to ten sponsors, and the

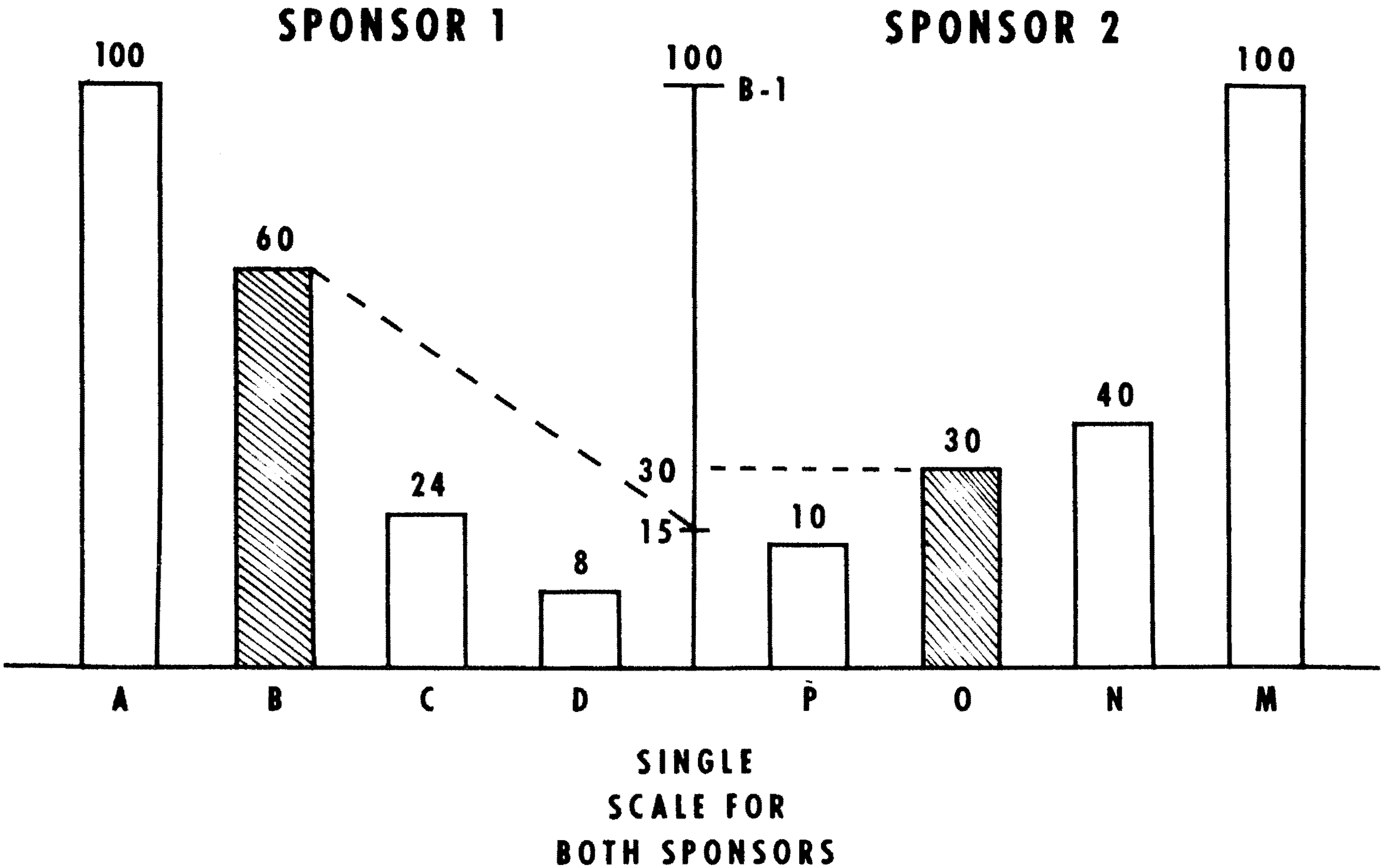

FIGURE 4 CROSS-SPONSOR BENEFIT RANKING

iterative utile assessment procedure described above for each sponsor is used.) This comparison between "B" and "O" provides enough information to rescale all of sponsor 1's programs onto sponsor 2's scale. Since "B" must be a 15 on sponsor 2's scale, the 50 on sponsor 1's scale must be divided by 15, as must "A," "C," and "D." This is shown on Figure 5. If a sponsor contracts his utile scale more than his true preferences, his programs may do poorly in the final analysis. For example, if sponsor 1 had claimed "B's" utiles was 90 rather than 60, his entire scale would have to be divided by 6 rather than 4 to be consistent with the belief that "B" is half as beneficial as "O".

The cross-sponsor benefit judgments are more difficult to make because the programs are much more diverse. For this reason, the cross-sponsor group is asked to make two or three cross-sponsor scales, using different programs units from each sponsor's list each time. This is a way of triangulating on the problem that forces inconsistencies and resolving them strengthens the final result so that it is more defendable.

Once the final cross-sponsor utile benefit scales has been chosen, the relative benefits of all of the decision units are made explicit. Now the utiles can be calculated for each program, and the programs prioritized from most beneficial to least beneficial. If there is disagreement over the numbers, they can be changed very easily. The important characteristics are the way the process is structured and the defendability of the output.

To summarize the process, given a discrete set of independent but competing decision issues ...

Rank order in terms of overall benefit to the command (utiles).

Assign a utile value of "100" to the most beneficial issue.

Assign lesser values of utile numbers to remaining issues IAW the perceived relative benefit.

Iterate utile numbers until a consistent "level of indifference" is established among all competing issues & combinations of issues.

Repeat this process to collapse different sponsor scales.

Throughout use interpersonal and group facilitation skills to surface hidden agendas and stimulate communications so that the major issues around each program are surfaced and recorded.

The application of Decision Analysis provides:

Start point in the Decision Process

Benefit consequences are visible

Value system is open, visible, reproducible

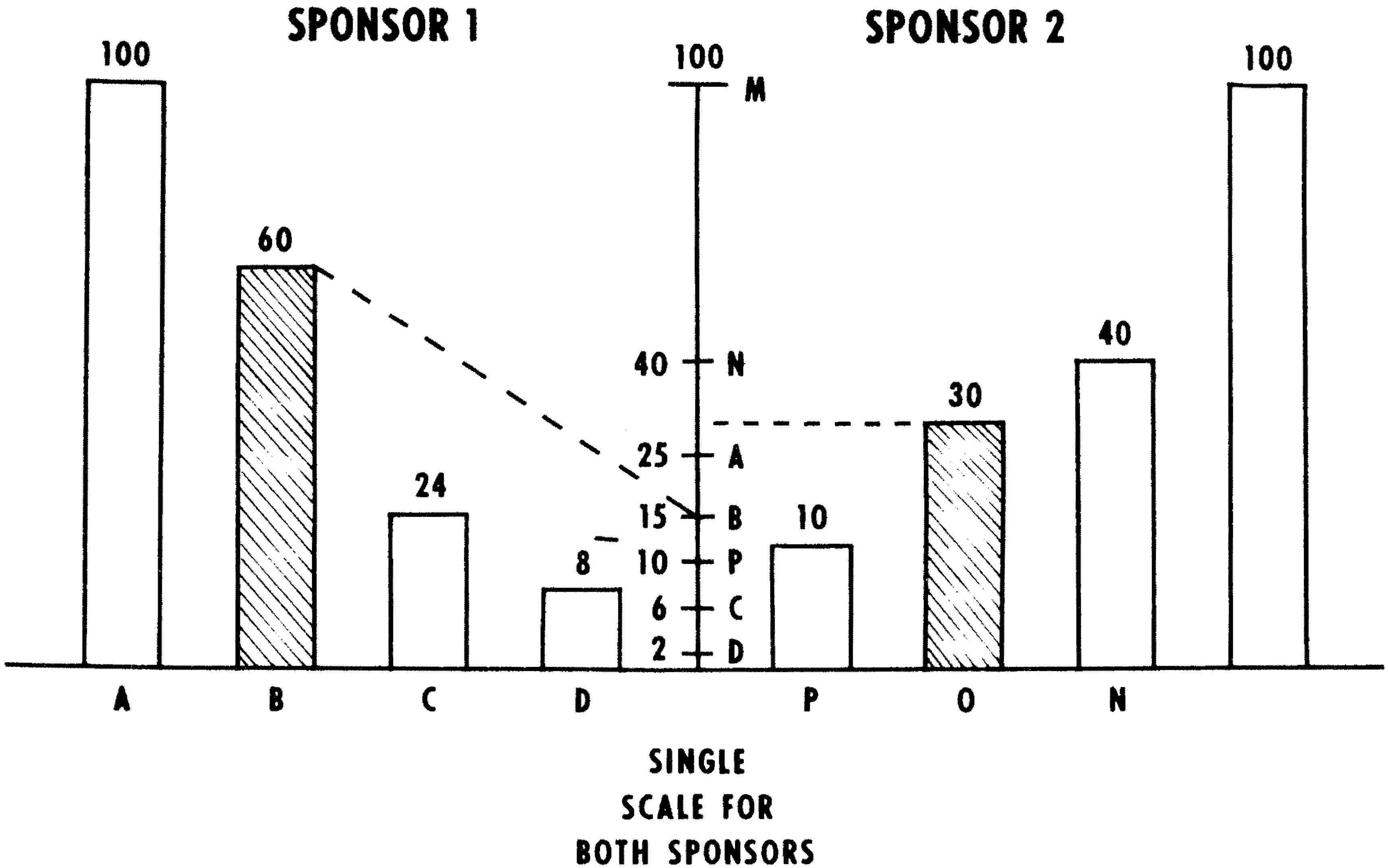

FIGURE 5 TWO-SPONSORS BENEFIT SCALE

Builds defense for major issues

Serves as a communications aid

Brings focus on contentious issues

In prioritizing of issues, there are as many uses for this technique as the OESOs imagination and the commander's pain will allow. When dealing with cost, a third column can be added, called cost benefit (Fig 6). Fig 7 shows the final differences between buying and using the cost-benefit criterion versus the benfit-only criterion. For a fiscal constraint of $100. The cost benefit criterion provides 68% of the possible benefit, which is a 33% increase over the benefit-only criterion.

PROCUREMENTS	INITIAL BENEFITS	TOTAL COSTS	$\frac{\text{BENEFIT}}{\text{COST}}$
A	100	16	6.2
B	99	36	2.8
C	95	56	1.7
D	90	9	10.0
E	87	30	2.9
F	83	20	4.2
G	70	35	2.0
H	70	26	2.7
I	60	2	30.0
J	55	1	55.0

Figure 6

PROCUREMENTS - INITIAL COMPARISONS

If the OESO is dealing with maintenance or training problems, time may be a factor and a time column may have to be added (Fig 8). Fig 9 shows the final differences between programming with the time benefit criterion versus the benefit only criterion. For a time constraint of 100 days the time benefit criterion provides 68% of the possible benefit, which is a 33% increase over the benefit-only criterion.

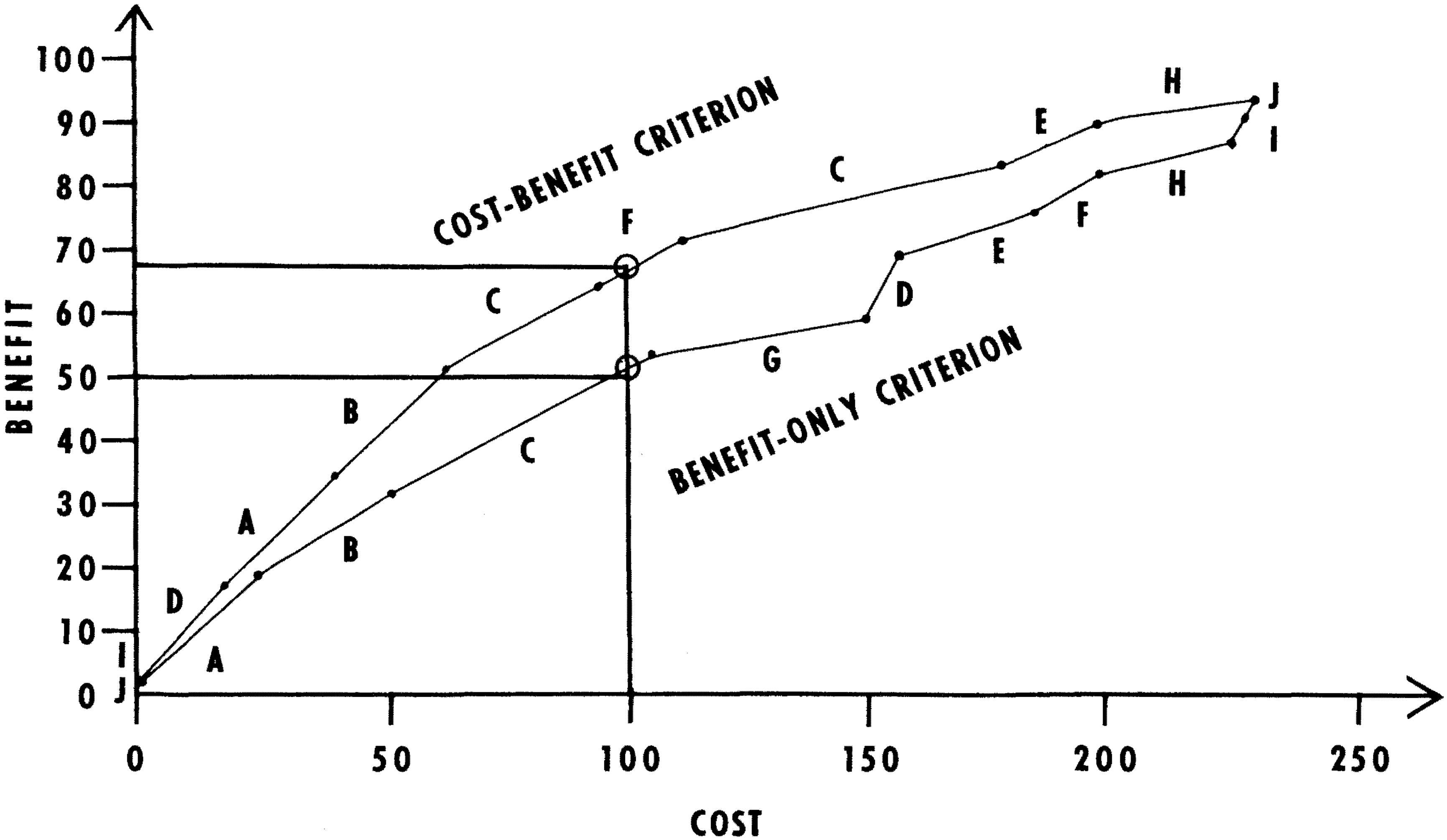

FIGURE 7

COST - BENEFIT VS BENEFIT - ONLY CRITERIA: FINAL COMPARISONS

Conclusions:

1. Need to look at other OR/SA techniques to see where interpersonal/ group facilitation skills can optimize outcomes.

2. Need to understand organization pain and what makes it occur.

3. Need to make interventions that address the organizational pain so that a need for the OESO is developed.

4. Need to look at Decision Analysis as a means of resource allocation or establishing priorities.

5. As a start, OESOs can use the bibliography at Incl 1 to look at some of the OR/SA techniques that may apply to organizational problems detected during assessments.

ACTIVITY	INITIAL BENEFITS	TOTAL TIME (DAYS)	BENEFIT TIME
A	100	16	6.2
B	99	36	2.8
C	95	56	1.7
D	90	9	10.0
E	87	30	2.9
F	83	20	4.2
G	70	35	2.0
H	70	26	2.7
I	60	2	30.0
J	55	1	55.0

Figure 8

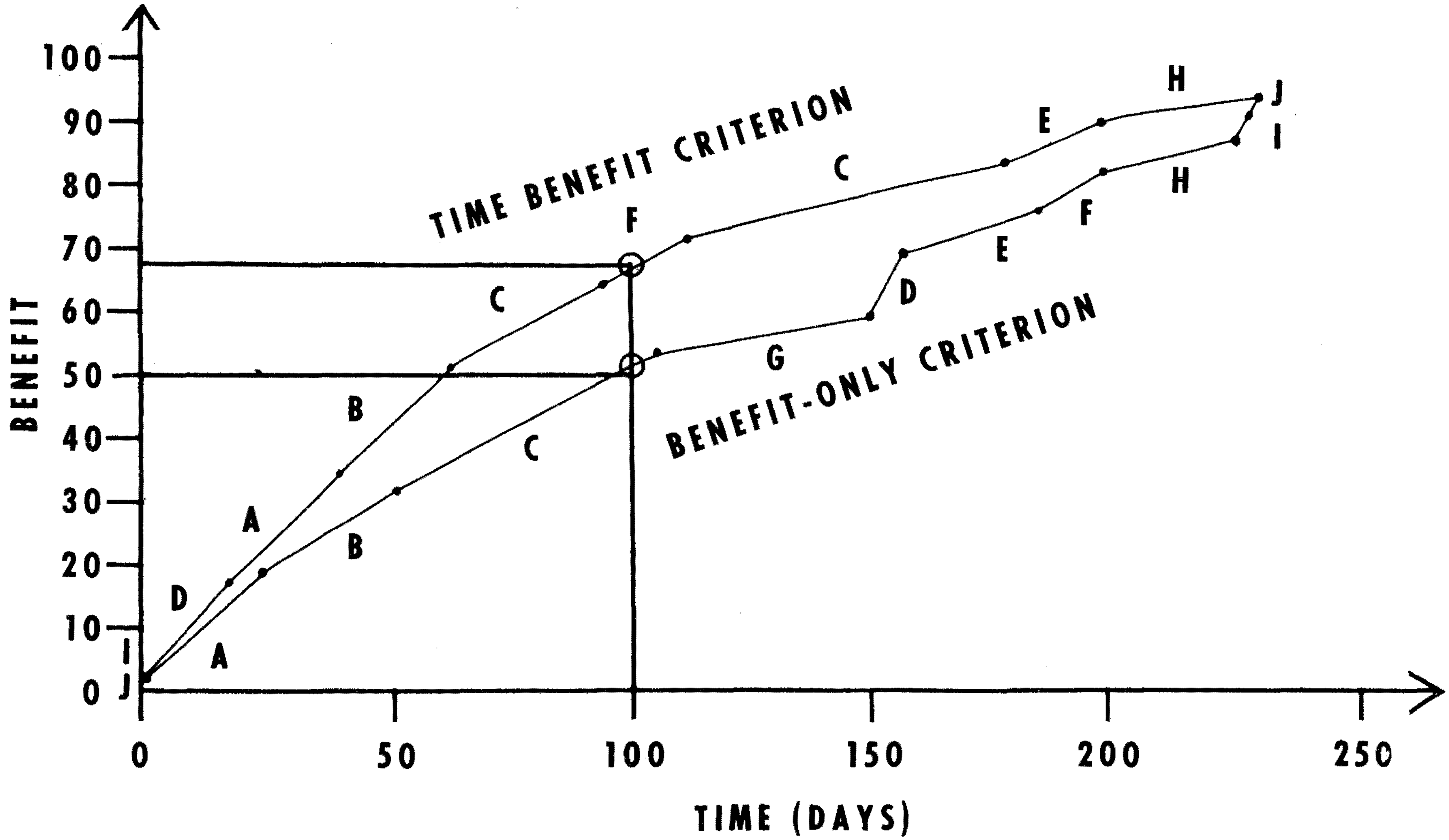

FIGURE 9

TIME - BENEFIT VS BENEFIT - ONLY CRITERIA: FINAL COMPARISONS

A MODEL FOR MACROSYSTEM INTERVENTIONS

CPT Richard W. Griggs
CPT Raymond P. Lowman II

When working with macrosystems, it is often necessary for consultants to intervene both internally (within the client system) and externally (into adjacent systems) in order to effectively facilitate change. This is true whether the client is a key organization within a macrosystem, or an entire macrosystem.

For example, when the client is a key organization within a macrosystem, such as a G-4 vis-a-vis a logistics community, the consultant may intervene both internally in the G-4 staff and externally into related logistics activities in order to assist the G-4 in better coordinating logistical operations.

If, on the other hand, the client is a macrosystem, such as a logistics community, the consultant may intervene internally into component logistical activities and externally into adjacent staff or command activities in order to facilitate the development of more effective logistics procedures. Incidentally, when dealing with macrosystems, consultants should attempt to have a single point of contact or contractual sponsor. This can facilitate coordination. Contractual sponsors may be either the "macrosystem manager" (e.g. the G-4), a special task force, or higher agent.

This paper describes a model (Fig. 1) which we find useful when consulting with(in) macrosystems. It is designed to facilitate the alignment of organizations within larger systems. Although detailed herein with respect to a key subsystem intervention, the model can be successfully applied to higher or lower echelon open-system interventions with little modification. Specific client objectives and the degree of openness within the target organization will determine the extent, if any, of the external intervention phase.

1. ENTRY - Initial contact between the consultant and the client sets the climate for the client-consultant relationship. When the consultant meets the client's initial expectations with respect to technical skills, experience, and professional bearing, or is accepted as an advisor, he establishes the credibility necessary for a healthy client-consultant relationship. Thorough pre-entry scouting is invaluable as a means of facilitating entry into a client system. Points which the consultant needs to consider include:

> Who is the potential client? Does the client have any known likes or dislikes? (If so, the OESO may want to change his approach, or even his appearance -- such as wearing field gear when visiting units in the field -- to complement the client organization.)
>
> What experience does the potential client have with OE?

MACROSYSTEMS INTERVENTION MODEL

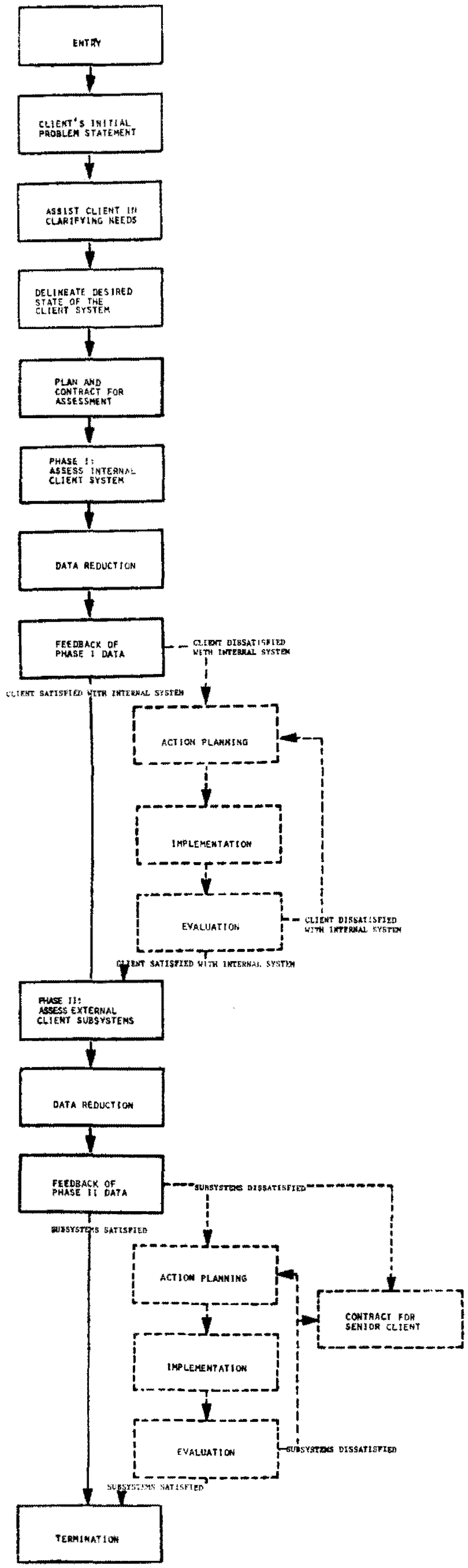

FIGURE 1

What is the reputation of the potential client? (Since negative findings may create biases, consultants should be careful to minimize the effect their biases may have on the client-consultant relationship. Avoid meeting consultant needs as opposed to client needs.)

What are the best/worse things which could happen during the initial meeting?

Finally, and perhaps most important -

What will the consultant do if his expectations prove to be inaccurate? Can he confront client-consultant differences, perhaps even decline working with the client?

2. CLIENT'S INITIAL PROBLEM STATEMENT - It is not uncommon for clients to pose issues which are not "problems," per se, but symptoms of problems. Just because the organization is not as the client expects does not mean that the organization is ineffective. In fact, the client himself may be a problem. Thus, it is advisable that consultants take a close look at clients' problems, and do not jump into hasty interventions. Although it may seem safe to say, "If you don't know where you're going, any road will get you there," "there" may be neither where the client intends to go, nor where the greatest benefit may be realized for the organization.

3. ASSIST THE CLIENT IN CLARIFYING NEEDS - Clarifying clients' needs is crucial to successful consulting operations. Clear and concise objectives give necessary direction, and establish criteria by which interventions may be judged. The absence of specific goals is frequently a reason some OE operations stall following feedback of assessment data -- subsequent actions have not been planned. Specific objectives can also be used to both limit and collate assessment data, thereby lessening the possibility of "data overload".

4. DELINEATE DESIRED STATE OF THE CLIENT SYSTEM - Once the client's specific concerns have been ascertained, it is helpful to delineate the "desired state" of the client system before entering the contracting stage. This serves four major purposes: (1) Motivates the client to translate often abstract personal concerns into more tangible organizational goals, (2) Helps insure that the client and the consultant share a clear understanding of what is meant by the organization's "desired state", (3) Provides a clear focus for the intervention, and (4) Establishes the organizational standards against which assessment data will be compared. Organization and functions manuals may be helpful at this point. However, they often reflect a theoretical position, and not what is needed or what actually exists.

5. PLAN AND CONTRACT FOR ASSESSMENT - Macrosystem interventions should be planned and contracted in stages in order to provide maximum flexibility during the operation. Further, a detailed initial contract would force the client to take a high initial risk. We prefer to prepare the client over a

period of time to accept the risk and permit an external assessment. We do, however, inform the client during initial negotiations of the probable need to perform both an internal and an external assessment in order to better assist him in organizing to meet both his objectives and systemic needs.

We begin with a Memorandum of Understanding -- an initial contract to deliver a "picture" of what actually exists within the client organization -- specifically addressing those areas pertinent to the client's stated objectives. This does not mean that the assessment is restricted to preclude surfacing issues not directly addressed by the client. Rather, we try to develop a mutually acceptable plan which will permit us to get the most complete picture possible of the client system's functional organization, internal processes, driving and restraining forces. We actively include the client in planning the assessment, both to afford him a sense of ownership of the operation, and to make him aware of the advantages, disadvantages, and expected outcomes of the various assessment techniques. The client is encouraged to review all recommended survey instruments and interview protocols.

It is strongly recommended that consultants use some form of written agreement during this and subsequent stages to set down what is to take place. A written "contract" has several benefits: (1) It serves to clarify operational goals and milestones, (2) Establishes ground rules under which participants agree to operate, and (3) Outlines projected actions, responsibilities, costs, and outcomes. Further, joint review of the written document presents yet another opportunity to surface hidden agendas or other problems which need to be addressed.

As a minimum, we recommend that the following points be addressed in the initial and subsequent assessment plans:

> What are the objectives of the assessment? How do these objectives fit into the overall consulting effort? What measurable criteria will be used to evaluate the success of the effort?
>
> What kinds of data will be collected? How and from whom will it be collected? How will it be used? Who will have access to it?
>
> What are the expected outcomes of the operation? What are the costs involved? What resources will be provided and by whom? What are the milestones?

6. PHASE I: ASSESS INTERNAL CLIENT SYSTEM - During this stage we try to determine the existing state of the client organization -- the conditions upon which change aimed at developing the "desired state" will be planned. To insure that the assessment is as objective as possible, we collect data relative to all aspects of the "desired state". This suggests that consultants should be prepared to either validate or invalidate the utility of the client's "desired state". The assessment may not, in fact, indicate a need for change.

Data collection procedures used during the internal assessment vary according to the needs, size, and availability of the client organization. Consultants should evaluate all available assessment techniques (interviews, survey instruments, observation, historical records, etc.) in order to determine the most effective method for obtaining desired data. Methods selected should yield data which is relevant to stated assessment goals. The use of multiple assessment techniques can assist in the collection of information from persons who do not readily respond to some methods, and may also be used to cross-check data.

Productive general questions include:

What are your duties/responsibilities?

What functions, if any, do you think should be added to/deleted from your area of responsibility in order to allow you to function more effectively?

What organizational policies assist/hinder you in accomplishing your duties?

The above and similar questions serve to ascertain what actually exists without biasing responses toward what should exist with respect to current organizational doctrine, or what may be implemented as a result of the assessment. Analysis of the differences between what actually exists vis-a-vis what should exist or what is being considered can help to identify both current dysfunctions and organizational preferences.

7. DATA REDUCTION (Phase I) - Most of the data generated during an assessment is of little practical use to the client. Raw data rarely lends itself to being rapidly correlated, verified, and sanitized. Considerable effort is usually necessary to reduce and present the data so that it is both useful and relevant to the overall consulting effort. Consultants should not be surprised if issues which were initially of major concern fail to materialize, or if areas which were not initially considered important seem to be of major significance. They should avoid emotional attachment to organizational issues and remain aware of the impact their biases may have on the flavor of the distilled data. Their job is to collect and reduce data to information which is objective, accurate, clear, and useful to the organization -- not to meet their personal needs or the personal needs of the client.

8. FEEDBACK OF PHASE I DATA - In order to reduce the possibility of overwhelming the client, we limit feedback at this point to internal assessment data because it is normally less threatening than external feedback, and more subject to his immediate control. We focus on issues the client can affect, and provide data relevant to decisional alternatives. Further, we keep feedback descriptive rather than evaluative to reduce the possibility of his becoming defensive. Since heavy feedback early-on can inhibit a client's willingness to permit an external assessment, we consider it prudent to withhold what appears to be extremely threatening feedback until

later when we hope the client will be more able to deal with it. This is not to suggest that we hide adverse information. Rather, we try to prepare the client to receive progressively more threatening data.

If, following feedback of Phase I assessment data, the client is satisfied with what is indicated to be the current internal state of the organization, the consultant should verify that the client's concept of the "desired state" has not changed. If it has not, it is safe to plan and contract for an external assessment if appropriate.

On the other hand, if the client is either dissatisfied with what appears to be the state of the organization, or has changed his concept of what is desired, the consultant should facilitate resolution of the differences before attempting Phase II.

When a client is dissatisfied with what exists internally, it is best to deal with the issues while they are fresh. Internal task-force action planning is worth consideration. Whatever the mode, planning should continue until all possible courses of action have been considered. Recommended implementations might then include MBO, role negotiation, responsibility charting, or team building. Implementations should continue until desired changes are well underway.

In instances when the client's concept of the "desired state" has changed, the consultant should help him clarify his objectives and redefine the "desired state". It is important to note that redefinition of the "desired state" may cause issues to surface which were not anticipated. These should be dealt with before expanding the intervention to external concerns.

(Note: Subsequent stages are more applicable when consulting with large, open systems or key organizations within macrosystems than with lower echelon, relatively closed organizations.)

9. PHASE II: ASSESS EXTERNAL CLIENT SUBSYSTEMS (and/or RELATED SYSTEMS) - External assessments are potentially more hazardous than are internal assessments. Not only can they be extremely threatening to clients, but they can also raise unrealistic expectations or cause other dysfunctional systemic reactions. Although assessment planning and contracting for this stage develop along much the same lines as during Phase I, the greater risks involved suggest that planning should address all possible outcomes, not only with respect to the client organization, but to contiguous organizations as well.

The external assessment is intended to study three main areas: (1) Interfaces between the client organization and related systems, (2) External perceptions of the effectiveness of the client organization, and (3) The external impact of changes effected or anticipated as a result of the internal assessment. This information can assist the client in determining what additional changes, if any, might improve the effectiveness of his organization.

External feedback is valuable because few organizations can afford to make internal changes without considering their impact on external related systems. Changes which may benefit the client organization may impact adversely on related systems. Since data collection procedures used in the internal and external assessments are similar, the following will concentrate on operational differences.

First, since the overall goal of the external assessment is to determine the degree of congruence between the client organization and significant related systems, it is necessary to survey a much broader population in greater depth than during the internal assessment due to the difficulty in isolating "significant related systems". External organizational relationships are often less formally structured than internal relationships, and are often subject to more intervening environmental variables. Thus, consultants should collect information from as many sources as possible in order to develop a valid picture of the client's impact within the community. A complaint at one interface may be a compliment at another; for example, some may complain of institutionalized "crisis management", whereas others may be satisfied with existing low levels of coordination because of the freedom it can afford.

Second, the external assessment should examine the client organization within the context of the environment within which it must operate. Consultants should be careful, however, that the suprasystem does not become the client. Comments should be solicited regarding both the client's <u>current</u> and <u>desired</u> goals, organization, and functions.

Given the foregoing considerations, possible methods for collecting and cross-checking data include:

<u>Survey instruments</u>. Questionnaires can be used to collect large amounts of information quickly, inexpensively, and anonymously. Unfortunately, their structured format makes it difficult to get at some issues in depth. Further, issues not addressed directly may be missed. Thus, we usually conduct some form of pre-instrument sensing session to surface additional issues for study.

The following question formats have proven to be particularly effective for collecting data:

> Respondents are asked to indicate their level of agreement-disagreement with positive statements keyed to the client's "desired state".
>
> Example: "Indicate your level of agreement-disagreement with the following statement on a scale of 1-5 ('strongly disagree' to 'strongly agree'): Blank provides adequate plans for future operations." (In this example the client had stated a desire to provide subordinate staffs with adequate plans).
>
> The use of "start", "stop", "continue", and "change" questions.

Example: "What three actions/policies should Blank implement to assist you in accomplishing your job?"

The above and similar formats can be used both to ascertain the target population's evaluation of how well the client has met stated objectives, and their desires with respect to the organization's future performance.

Interviews. Individual and/or group interviews can be used to collect specific information and to help reduce questionnaire data. Interviews, however, require skilled interviewers, are expensive, and may generate irrelevant data. Although increased structure can reduce the latter, it may also limit the collection of relevant data.

Attendance at inter-agency meetings. Meetings are a particularly rich source of data. We begin attending meetings in which the client participates as soon as possible. Not only does this permit us to observe both internal and external organizational processes, but it has also served to credential us as consultants. Further, observation of participation patterns may indicate early-on the need for a meeting management skills intervention.

Monitoring of macrosystem activity reports. Weekly significant activity reports are invaluable as a means to quantify, compare, and contrast the outputs of the various components of the suprasystem vis-a-vis the client organization. They can also be used to illuminate the existance of duplicated effort and other forms of poor coordination.

Review of governing regulations. The guidelines which govern the client system should not be overlooked. All organizations are subject to regulations which play a major role in both what does or may exist.

10. DATA REDUCTION (Phase II) - Data reduction procedures used during this stage are similar to those used during Phase I. External assessment data is reduced into three categories: (1) Data pertinent to the specific goals of the external assessment, (2) Feedback relevant to the client organization's existing state, and (3) The probable impact of changes being contemplated by the client as a result of Phase I. Due to the size and diversity of the population sampled, it is usually necessary to perform comparative analyses of the collated data before determining the relative importance of conflicting information.

11. FEEDBACK OF PHASE II DATA - Since this stage is critical to the overall success of macrosystem interventions, awareness of the client's sensitivity to feedback is fundamental. Despite the importance of external feedback to open systems, many clients tend to rationalize adverse external feedback as being beyond their control. Thus, we attempt to reduce the possibility of "data overload" by limiting feedback in both quantity and content to levels which we believe to be tolerable and constructive. Specifically, we provide answers to questions which we contracted to answer. We do not "dump data" by submitting a verbatim final report. Instead, we brief from a few simple slides, beginning with less threatening data, and increasing the level of

risk (if any) as we sense the client is able to accept it. We only provide a short summary of the data, highlighting major findings and their implications.

It is rare when the client and associated systems are satisfied with their relationships. Normally, we find one of the following situations: (1) The client is satisfied but associated systems are dissatisfied, (2) The client is dissatisfied but associated systems are satisfied, or (3) Both the client and associated systems are dissatisfied with what exists.

The first situation -- the client is satisfied but associated systems are dissatisfied -- may be caused by either a naive or unsupportive client, or by overly demanding associated systems. Once specific issues are clarified, appropriate implementations may include conflict resolution, role negotiation, responsibility charting, or problem-solving workshops. In those instances when the issues cannot be readily addressed from the client's perspective, the consultant may discuss with the client the possibility of their negotiating with a higher level of authority in order to find a client better able to deal with the issues. It should be pointed out that the issues may be macrosystemic, and do not necessarily reflect adversely on the client. Some problems are simply beyond the power of some organizational levels to resolve.

The second situation -- the client is dissatisfied but associated systems are satisfied -- may be caused by a hard-driving (perhaps manipulated) client supporting unproductive or unconcerned associated systems. For example, the client may be responsible for planning operations, but may actually spend most of his time dealing with day-to-day crises because associated systems require substantial assistance in solving problems. Once the specific cause of the client's dissatisfaction is determined and validated, appropriate implementations might be role negotiation or responsibility charting coupled with organizational training.

The third situation -- both the client and associated systems are dissatisfied -- presents an almost unlimited choice of causal factors, planning and implementation strategies. Unfortunately, unlimited choice can lead to confusion. Therefore, it is particularly important in this situation to check the client's immediate reaction to the data. Managers tend to be action-oriented. When faced with serious problems, some resort to rationalization, others to overreaction, but few are readily able to deal with situations for which they may be responsible.

When dissatisfaction is widespread, we often find it helpful to withdraw momentarily from the immediate issues, and return to a review of the regulations which govern the client system. They may be the cause of the dysfunction. When guidelines are unclear with respect to goals, authority, and responsibilities, conflict is common. After clarification of the rules which govern the macrosystem, we try to facilitate the development of more coherent and supportive systemic inter-relationships. These are then used as a catalyst for open systems planning and coordination.

Another alternative calls for the client to refer the OE effort to a new client with greater influence over the macrosystem. It may be necessary to recycle the entire intervention with the new client in order to align the organizational elements within the macrosystem. Once alignment is achieved, however, experience indicates that the resulting synergy not only benefits the individual organizations within the macrosystem, but also improves the effectiveness of the macrosystem as a whole.

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. It includes information about the OETC Library's Loans-to-the Field service, which has operated successfully for a year and a half. Many OESOs have found that using our loan service is an excellent way to preview books they are considering for their own collections. Others use our books as references for workshop planning or for keeping up on new trends in OE. And some others (the mythical 10%?) haven't gotten the word yet. Please read the cover letter and use the form. If you don't know exact titles (or even vague titles), let us know the subject area of your need and we'll do the rest!

Next you'll find the newly revised bibliography BASIC REFERENCE LIBRARY FOR OESOs. The list has grown to 65 titles plus the University Associates ANNUALS and HANDBOOKS and covers a wide range of topics associated with OE/OD. Feedback on the usefulness of this list to those of you on the working end of it would be greatly appreciated. I'd especially like to know if hot items have been left off the list and should be included on the next revision.

Please write, or call autovon 929-7228.

Lynn
Librarian, OETC

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

ATXW-RMA 15 September 1978

SUBJECT: OETC Library Loans-to-the-Field Service

OESOs in the Field

1. The OETC Library will loan Library books to practicing OESOs and OE Key Managers to support expressed mission-related needs of the individual OESOs and OE Key Managers. In cases of conflicting needs, priority for the use of OETC Library materials will be given to the staff and students of OETC.

2. Prospective borrowers are urged to search for needed titles at local libraries before contacting the OETC Library. If a loan from the OETC Library is required, the borrower will complete a Request to Borrow Books (DA Form 2496, copy inclosed) and mail it to the OETC Library. Use of appropriate substitution on requests will enable more requests to be met. In cases of urgent need, telephone requests will be filled. A written request must also be sent to serve as back-up documentation for the loan.

3. Upon receipt of a Request to Borrow Books, the OETC Library will mail available titles immediately. Appropriate substitutions will be made if so authorized by the borrower. If books cannot be mailed within the time period indicated on the request, the OETC Library will notify the borrower.

4. A limit of three books at any one time will be on loan from the OETC Library to any one OESO or OE Key Manager. The loan period will be 10 working days from the date of receipt. Instructions for returns will be mailed with the books. Successful operation of the Loans-to-the-Field service depends on the prompt return of borrowed books. Late returns will be cause for the suspension of borrowing privileges.

5. Feedback on this loan service would be appreciated. Please address comments and suggestions to Commander, USAOETC, ATTN: Librarian, Fort Ord, CA 93941. The Library telephone number is 242-7228 or 6075 (Autovon 929).

1 Incl
as

/s/ ANCIL L. DENZLER
LTC, Infantry
Commanding

DISPOSITION FORM

For use of this form, see AR 340-15, the proponent agency is TAGCEN.

.FERENCE OR OFFICE SYMBOL	SUBJECT
	Request to Borrow Books

TO	FROM	DATE	CMT 1
USAOETC ATTN: Library Fort Ord, CA 93941			

1. Request that I be sent the following OETC Library book(s) to be used by me for a period not to exceed 10 days:

Book Title	Author's Name
______________________________	____________________
______________________________	____________________
______________________________	____________________

2. The books are needed for the following purpose ______________________________

____

____.

Substitutions of appropriate materials may/may not be made. (please indicate.)

3. I understand that materials to support my request may be unavailable at this time. My needs would be met if books were sent at any time between now and the following date: ______________. I understand that after that date no action will be taken on this request.

Incl 1

DA FORM 2496 REPLACES DD FORM 96, WHICH IS OBSOLETE.

BASIC REFERENCE LIBRARY FOR

ORGANIZATIONAL EFFECTIVENESS STAFF OFFICERS (OESOs)

USAOETC	LIBRARY AND LEARNING CENTER	SEP 1978

This list of books was compiled with the assistance of the Training Faculty of the Organizational Effectiveness Training Center in order to provide a summary of selected resources available to support the mission of the OESO. Basic materials are indicated with an asterisk(*). Addresses for publishers which are not provided in this bibliography are given in the section of this publication headed "OESO Address Book."

REFERENCE

Bernhard, Genore H.
HOW TO ORGANIZE AND OPERATE A SMALL LIBRARY, c1975
(Basic procedures for organizing and controlling office collections)

Publisher: The Highsmith Company, Inc.
P.O. Box 25
Fort Atkinson, WI 53538

Price: approximately $5.00, paperbound

Clayton, Bruce and others, compilers
THE SOURCE AND RESOURCE DIRECTORY, COMMUNITY DEVELOPMENT DIVISION, 1976
(Annotated bibliography of materials in areas related to community development. Includes print and audiovisual materials.)

Publisher: American Society for Training and Development

Price: approximately $5.50, paperbound

Massarik, Fred, compiler

BIBLIOGRAPHY ON HUMAN RELATIONS TRAINING AND RELATED SUBJECTS, 1976
(Author/title listing of books, coded by subject areas.)

Publisher: NTL Institute for Applied Behavioral Science

Price: approximately $3.00, paperbound

*Murrell, Kenneth and Vaill, Peter B., compilers

ORGANIZATION DEVELOPMENT: SOURCES AND APPLICATIONS, c1975
(Bibliography of books and periodical articles, many with annotations, which deal with OD and related fields.)

Publisher: American Society for Training and Development

Price: approximately $5.50, paperbound

THEORY AND BACKGROUND MATERIAL

Boshear, Walton C., and Albrecht, Karl G.

UNDERSTANDING PEOPLE: MODELS AND CONCEPTS, c1977
(Compilation of models useful in the description and understanding of human behavior.)

Publisher: University Associates, Incorporated

Price: approximately $10.00, paperbound

Herman, Stanley M. and Korenich, Michael

AUTHENTIC MANAGEMENT: A GESTALT ORIENTATION TO ORGANIZATIONS AND THEIR DEVELOPMENT, c1977 (Introduction to organization development techniques founded in Gestalt theory.)

Publisher: Addison-Wesley Publishing Company

Price: approximately $10.00, paperbound

*Hersey, Paul and Blanchard, Kenneth

MANAGEMENT OF ORGANIZATIONAL BEHAVIOR: UTILIZING HUMAN RESOURCES, 3rd edition, c1977 (Summary of leadership and management theories, including authors' model of situational leadership.)

Publisher: Prentice-Hall, Incorporated

Price: approximately $8.00, paperbound

*Huse, Edgar

ORGANIZATION DEVELOPMENT AND CHANGE, c1975
(College-level text which includes practical applications and implementation strategies.)

Publisher: West Publishing Company
311 California Street, Suite 700
San Francisco, CA 94104

Price: approximately $15.00, hardbound

Ingalls, John D.

HUMAN ENERGY: THE CRITICAL FACTOR FOR INDIVIDUALS AND ORGANIZATIONS, c1976 (insightful description of behavioral forces at work in individuals and within organizations.)

Publisher: Addison-Wesley Publishing Company

Price: approximately $15.00, hardbound

*Kast, Fremont and Rosenzweig, James E.

ORGANIZATION AND MANAGEMENT; A SYSTEMS APPROACH, 2nd edition, c1974
(Basic text on systems theory as it relates to management.)

Publisher: McGraw-Hill Book Company

Price: approximately $15.00, hardbound

*Leavitt, Harold J.

MANAGERIAL PSYCHOLOGY, 4th edition, c1978
(Coverage of major categories of interpersonal problems in organizations.)

Publisher: University of Chicago Press
5801 Ellis Avenue
Chicago, IL 60637

Price: approximately $10.00, hardbound

Luthans, Fred

ORGANIZATIONAL BEHAVIOR, 2nd edition, c1977
(Basic text on the current theories of the organizational behavior approach to management.)

Publisher: McGraw-Hill Book Company

Price: approximately $15.00, hardbound

*Margulies, Newton and Raia, Anthony P.

ORGANIZATION DEVELOPMENT; VALUES, PROCESS AND TECHNOLOGY, c1971
(Authoritative general textbook, particularly useful in its coverage of assessment.)

Publisher: McGraw-Hill Book Company

Price: approximately $15.00, hardbound

*McGill, Michael E.

ORGANIZATION DEVELOPMENT FOR OPERATING MANAGERS, c1972
(Introduction to OD techniques, specifically oriented to managers.)

Publisher: AMACOM (DIvision of American Management Association)

Price: approximately $15.00, hardbound

Merry, Uri and Allerhand, Melvin E.

DEVELOPING TEAMS AND ORGANIZATIONS: A PRACTICAL HANDBOOK FOR MANAGERS AND CONSULTANTS, c1977 (Team approach to management development, particularly applicable to strategic planning for OE Key Managers.)

Publisher: Addison-Wesley Publishing Company

Price: approximately $17.00, hardbound

Schein, Edgar H.

ORGANIZATIONAL PSYCHOLOGY, 2nd edition, c1970
(Brief, informative presentation of a general theory of organizational behavior.)

Publisher: Prentice-Hall, Incorporated

Price: approximately $6.00, paperbound

*Shaw, Marvin E.

GROUP DYNAMICS: THE PSYCHOLOGY OF SMALL GROUP BEHAVIOR, 2nd edition, c1976 (Text dealing with the formation and interaction processes of groups.)

Publisher: McGraw-Hill Book Company

Price: approximately $15.00, hardbound

*U.S. Army War College

ARMY COMMAND AND MANAGEMENT; THEORY AND PRACTICE, 1977
(Reference text for curriculum of Department of Command and Management Revised edition due late 1978.)

Source: U.S. Army War College
Department of Command and Management
Carlisle Barracks, PA 17013

U.S. Military Academy

A STUDY OF ORGANIZATIONAL LEADERSHIP, c1976
(Comprehensive collection of articles by military and civilian experts.)

Publisher: Stackpole Books
Cameron and Keller Streets
Harrisburg, PA 17105

Price: approximately $10.00, paperbound

PRACTICAL APPLICATIONS AND SKILL BUILDING

Addison-Wesley series on Organization Development:

*Beckhard: ORGANIZATION DEVELOPMENT; STRATEGIES AND MODELS, c1969
*Beckhard and Harris: ORGANIZATIONAL TRANSITIONS: MANAGING COMPLEX CHANGE, c1977
*Bennis: ORGANIZATION DEVELOPMENT; ITS NATURE, ORIGINS AND PROSPECTS, c1969
Blake and Mouton: BUILDING A DYNAMIC CORPORATION THROUGH GRID ORGANIZATION DEVELOPMENT, c1969
Davis and Lawrence: MATRIX, c1977
*Dyer: TEAM BUILDING; ISSUES AND ALTERNATIVES, c1977
Galbraith: DESIGNING COMPLEX ORGANIZATIONS, c1973
Lawrence and Lorsch: DEVELOPING ORGANIZATIONS; DIAGNOSIS AND ACTION, c1969
*Nadler: FEEDBACK AND ORGANIZATION DEVELOPMENT, c1977
Roeber: THE ORGANIZATION IN A CHANGING ENVIRONMENT, c1973
*Schein: PROCESS CONSULTATION; ITS ROLE IN ORGANIZATION DEVELOPMENT, c1969
Steele: PHYSICAL SETTINGS AND ORGANIZATION DEVELOPMENT, c1973
Walton: INTERPERSONAL PEACEMAKING: CONFRONTATION AND THIRD-PARTY CONSULTATION, c1969 (Short monographs by experts in the field.)

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Adams, John and others

TRANSITION: UNDERSTANDING AND MANAGING PERSONAL CHANGE, c1976
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Blake, Robert R. and Mouton, Jane Srygley

CONSULTATION, c1976
(Synthesis of consultation theory and practice; development of the authors' Consulcube model.)

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*Burke, W. Warner and Hornstein, Harvey A., editors

THE SOCIAL TECHNOLOGY OF ORGANIZATION DEVELOPMENT, c1972
(Collection of case studies and research reports of practical applications of organization development.)

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*Dyer, William G.

INSIGHT TO IMPACT: STRATEGIES FOR INTERPERSONAL AND ORGANIZATIONAL CHANGE, c1976 (Suggestions for implementing and evaluating the process of change.)

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Edwards, Allen L.

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*Egan, Gerard

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FACILITATING COMMUNITY CHANGE; A BASIC GUIDE, c1976
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*Ford, George A., and Lippitt, Gordon L.

PLANNING YOUR FUTURE: A WORKBOOK FOR PERSONAL GOAL SETTING, c1972
(Practical suggestions for planning OE programs or individual OE Operations.)

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Price: approximately $5.00, paperbound

*Fordyce, Jack L. and Weil, Raymond

MANAGING WITH PEOPLE: A MANAGER'S HANDBOOK OF ORGANIZATION DEVELOPMENT METHODS, c1971 (Source book of OD techniques; useful in explaining OE operations to commanders.)

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*French, Wendell and Bell, Cecil H.

ORGANIZATION DEVELOPMENT: BEHAVIORAL SCIENCE INTERVENTIONS FOR ORGANIZATION IMPROVEMENT, 2nd edition, c1978 (Source book of concepts and practices of OD; useful in explaining OE operations to commanders.)

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Harvey, Donald F. and Brown, Donald R.

AN EXPERIENTIAL APPROACH TO ORGANIZATION DEVELOPMENT, c1976 (Simulations useful in all phases of an OE operation, especially implementation.)

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A TRAINERS GUIDE TO ANDRAGOGY; ITS CONCEPTS, EXPERIENCE AND APPLICATION, Revised edition, 1973 (Guide to theories and practical applications of adult education; useful in developing workshops.)

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U.S. Government Printing Office
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*Kast, Fremont E. and Rosenzweig, James E.

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ORGANIZATIONAL PSYCHOLOGY: A BOOK OF READINGS, 2nd edition, c1974
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*Mahler, Walter R.

DIAGNOSTIC STUDIES, c1974
(Handbook of data collection and analysis techniques useful in assessing organizational effectiveness.)

Publisher: Addison-Wesley Publishing Company

Price: approximately $14.00, hardbound

*Miller, Sherod, Nunnally, Elam W., and Wachman, Daniel B.

ALIVE AND AWARE: HOW TO MAKE THE MOST OF YOUR RELATIONSHIPS THROUGH BETTER COMMUNICATION, c1975 (System approach to the process of communication; source of Awareness Wheel model of communication used in L&MDC.)

Publisher: Interpersonal Communication Programs, Incorporated
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Price: approximately $7.00, paperbound

*Morgan, Henry H. and Cogger, John W.

THE INTERVIEWER'S MANUAL, c1973
(Basic guide to interviewing techniques; appendix provides forms to use in structuring and evaluating interviews.)

Publisher: The Psychological Corporation
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Morrisey, George L.

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THE CONFERENCE BOOK, c1977
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Publisher: Gulf Publishing Company

Price: approximately $14.00, hardbound

*Pfeiffer, J. William and Jones, John E.

ANNUAL HANDBOOK FOR GROUP FACILITATORS ('72 - '78 editions)
HANDBOOK OF STRUCTURED EXPERIENCES FOR HUMAN RELATIONS TRAINING (Vols I-VI) REFERENCE GUIDE TO HANDBOOKS AND ANNUALS, 2nd edition
(Standard resource collections of practical training materials.)

Publisher: University Associates, Incorporated

Price: ANNUAL HANDBOOKS, approximately $13.00 each, paperbound; HANDBOOKS and REFERENCE GUIDE, approximately $6.00 each, pb.

Pfeiffer, J. William and others

INSTRUMENTATION IN HUMAN RELATIONS TRAINING, 2nd edition, c1976
(Guide to content and use of instruments; order information is included.)

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*This, Leslie E.

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(Nuts and bolts approach to meetings, workshops and training activities for fewer than one hundred participants.)

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HUMAN COMMUNICATION, 2nd edition, c1977
(Presents a process model useful in the assessment of organizational communication patterns.)

Publisher: Random House
457 Hahn Road
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Price: approximately $12.00

*Varney, Glenn H.

ORGANIZATION DEVELOPMENT FOR MANAGERS, c1977
(Brief but <u>complete</u> overview of OD; excellent basic reference for practitioners as well as managers.)

Publisher: Addison-Wesley Publishing Company

Price: approximately $10.00, paperbound

*Zunin, Leonard and Zunin, Natalie

CONTACT: THE FIRST FOUR MINUTES, c1972
(Covers a range of entry techniques useful in dealing with people in new situations, such as briefing an OE program or contracting for a new operation.)

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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.

THE FOUR STEP ORGANIZATIONAL EFFECTIVENESS PROCESS