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**An Investigation of the Consulting Styles of Training
Planning Specialists in a Government Sponsored
Training Consulting Service**

Thomas F. Gram

**A Thesis
in
The Department
of
Education**

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ABSTRACT

An Investigation of the Consultation Styles of Training Planning Specialists in a Government Sponsored Training Consulting Service

T. F. Gram

In 1986 the Ministry of Skills Development in the province of Ontario launched "Ontario's Training Strategy" to help companies and organizations use training as a strategic tool for economic success. A major component of the program is the "Training Consulting Service" which provides advice and expertise to organizations in the area of training and human resource planning and implementation. The Training Consulting Service is staffed by training consultants skilled in training planning and design at offices across Ontario.

The goal of the Training Consulting Service is to help organizations more effectively design and implement training programs and strategies and, through the transfer of required skills, help clients to become "self sufficient" in these areas. Literature on consultation styles suggest that to achieve these goals, a consulting approach is required that is highly collaborative in nature and concentrates on the "process" of consultation.

A study was conducted to determine the consultation styles of the training consultants working within the Training Consulting Service. A Training Consultation Style Survey was sent to all training consultants which required them to indicate their likely behavioral responses to a series of typical consulting scenarios. Responses were categorized into three different consulting approaches or "styles"; product orientation, prescriptive orientation, and process orientation. Other conditions included phase of consultation (entry, analysis, solution, evaluation) and perceived training expertise of the client (non-experienced, moderately experienced, experienced).

Results indicated a mixed use of consulting style with a tendency towards process oriented consulting except in the evaluation phase of consultation and when clients are perceived to have training experience. In these conditions product oriented consulting dominates. Possible explanations for these results and their implications for the Training Consulting Service are discussed.

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CHAPTER I

BACKGROUND OF PROBLEM

Introduction

Formalized education and training have been with us for centuries. The notion of a "technology" of instruction whereby a body of scientific knowledge could be applied to solving an instructional or educational problem, however, is a fairly recent phenomenon. An early example was Gilbert's (1961) "Mathetics" system. It described very specific methods for task analysis, behavior classification, and learning exercise design based on tested principles of learning and behavior. Mathetics was an early example of a "technology" of education defined as an analysis and design process rather than an instructional product or hardware system. More specifically, it was a methodology for the systematic design of learning experiences through the application of the sciences of behavioral psychology and human learning.

Since that time, the study and application of instructional technology has developed at a rapid pace. Over the years the field has grown to incorporate general systems theory, programmed instruction, instructional media and an increased interest in competency and performance-based instruction (Romiszowski, 1981). The models, systems and procedures that have been developed in the area of instructional and training design amount to a technology of instruction that can be used effectively and creatively to solve a vast range of instructional problems in both academic and business environments (Gagne & Briggs, 1979; Dick & Carey, 1985; Nadler, 1984; Warren, 1982; Tracy, 1971.)

The practitioners of these methods are the instructional designers and training specialists whose role is increasingly recognized and accepted in the education and training communities as instructional technology continues to grow and mature.

To the experienced instructional/training designer (and their clients), it is obvious that a knowledge of conceptual and technical skills in instructional design is insufficient for its effective application. The process of instructional/training design is most often employed in consultation with a client or subject matter expert. Therefore, the nature of the client-consultant relationship is critical to the successful application of instructional planning and design techniques. Davies (1975) has cogently stated:

In an almost desperate attempt to realize the task - we sometimes tend to ignore the relationship side of the instructional situation. No matter how perfect our development and evaluation procedures, no matter how sophisticated and scientifically based our techniques, little will be achieved if the quality of the human relationships is overlooked or ignored. A project that is task oriented without also being relationship oriented, thereby increases the probability of its own rejection (p. 372).

Despite such insights, the nature of the consulting relationship in instructional/training design situations has been ignored for some time in the research literature of educational and training technology. It is becoming clear, however, that "consulting skills" are essential for an instructional/training specialist to develop and maintain a successful collaborative relationship with a client or subject matter expert. This is evidenced by the fact that "consulting" or "client interaction" skills have appeared in many recent competency studies for the instructional/training design profession (e.g. McLagan, 1982; International Board of Standards for Training Performance and Instruction, 1986; Nadler, 1980; Bratton, 1984; Foshey, 1984). Yet few formal studies have been undertaken to determine how these skills are best applied in the context of instructional design.

This study investigates the consultation behaviors of training and development specialists working in a very specific environment: The "Training Consulting Service" provided by the Ontario government to businesses in Ontario as part of "Ontario's Training Strategy", a series of programs designed by the Ministry of Skills

Development to improve Ontario's competitive position by "investing in people". (Breaking New Ground, 1986).

As in all instructional design and planning efforts, the success of the Training Consulting Service will depend on both the conceptual/technical knowledge of the training consultants that provide the service and on the effectiveness of the consulting style they employ in their client relationships.

Educational Technology and Instructional Design in Business and Industry

This research study was conducted in a training and development consulting environment. It is, therefore, important to make clear the distinctions and similarities between educational technology, instructional design and training development. Definitions of the above terms vary greatly in the literature. An attempt is made here to draw on the most commonly accepted descriptions.

Educational Technology has been defined as ... "a complex integrated process involving people, procedures, ideas, devices and organization, for analyzing problems and devising, implementing, evaluating and managing solutions to those problems, involved in all aspects of human learning" (AECT, 1977 p.1).

The broad scope of educational technology has enabled it to draw on many fields of study including psychology, adult learning, management theory, cybernetics and systems thinking, computer science and communications theory among others. The result is that today educational technology has almost become a "science" in itself with its own body of diverse knowledge gleaned from empirical and observational study. The actual "technology" or application methodologies of of this science have become sub-fields within educational technology (Romiszowski, 1981).

One such sub-field of application has come to be known within the education profession as instructional design or instructional development. Instructional design

has been defined by the Association for Educational Communications and Technology as "a systematic approach to the design, production, evaluation and utilization of complete systems of instruction, including all appropriate components and a management pattern for using them (AECT, 1977, p.172).

The effectiveness and efficiency of instructional design methodology in education made instructional design an attractive tool in the field of training and development in business and industry. Patton (1980) notes that educational technology has had a significant influence on the field of training in business and industry especially in the area of technical and skills training. The greatest impact has been upon the analysis phase of training design. Needs, task and trainee analysis are now used routinely to more effectively plan training programs.

In business and industry situations, traditional "on-the- job" training was often used as a "quick fix" to solve problems in job performance. Training was often a solution looking for a problem. It became increasingly evident that instruction was not the only solution, or often even the best solution to a job performance problem. Training managers began to realize that theoretically very effective training based on sound design principles, was failing to eliminate the poor job performance as designed (Romiszowski, 1981).

This problem led to the development in business/industry of "performance technology": a more sophisticated approach to the analysis of performance problems to determine if training is an appropriate solution, or if other non-training interventions (such as job engineering, better selection procedures, management improvement and job reorganization) were more appropriate (Harless, 1968; Gilbert, 1967, 1978; Mager and Pipe, 1970; Rummler, 1972,).

Methods of needs and performance analysis have become an integral part of the training design and development process. This is reflected in the different emphasis evident in the definition of training and development provided by The American Society

for Training and Development (as compared with AECT's definition of instructional development). ASTD defines training and development with a focus of "identifying, assessing, and... through planned learning... helping develop the key competencies (knowledge, skill and attitudes) which enable individuals to perform current or future jobs." (McLagan, 1982, p.19).

Even though the AECT and ASTD definitions differ in focus, they are essentially the same as far as the design and development process they describe is concerned. The two most visible differences are first, the training and development definition overtly includes the initial step of determining the actual skills needed and second, the training development definition relates training to "jobs". These minor differences do not change the common core of the two definitions but rather reveal the difference in the orientations of the two different sectors, business/industry and education, and their terminologies (Wellington, 1984).

The core concern of the two definitions is, of course, "instruction" and its effective design and implementation to ensure that learners/trainees achieve desired learning outcomes. A recent joint task force of Association of Educational Communications and Technology (AECT) and The National Society for Performance and Instruction (NSPI) developed a set of core competencies for the training and development professional. In describing the competencies the task force chose to use the term "instructional design" rather than "instructional development" or "training development". They state that "...historically authors in the field have distinguished between design and development and between instruction and training. However, we believe current usage in the private sector is converging on the term instructional design for this field .." (International Board of Standards for Training, Performance and Instruction, 1986, p.1)

It is with this recognition of convergence in the fields of instructional technology and training and development that the term instructional design will be used throughout this study.

Two well known instructional design models are presented from the fields of education (Fig. 1) and business/industrial training (Fig. 2). A quick comparison reveals the similar processes in these practices as well as the different emphasis in each as described in the above definitions.

The Human System in Instructional Design

Research conducted in instructional design and educational technology over the years has largely involved enquiries into topics related to the instructional design and learning processes (e.g. message design, systems models, learning styles, etc). In contrast, few studies have been conducted which provide useful information to aid the instructional/training design specialist in establishing an effective relationship with the client. It is often assumed that the use of a "systems approach" to instructional design will reduce or eliminate any relationship problems that may arise in its application (Davies, 1975). However, by focusing on the instructional design system another system, which Arn and Strickland (1975) have identified as the "human system", is being ignored. The human system exists when two or more people interact. If the human system is not fully considered in an instructional design process the possibility of failure increases.

The application of a systematic approach to instructional design assumes a high level of ownership on the part of the participants. For mutual ownership to occur, it must be continually nurtured and supported so it will grow throughout the application of the process. Arn and Strickland (1975) point out that:

(It) is the effectiveness of the participation of the people which determine the effectiveness of the (development) system. What determines the effectiveness of

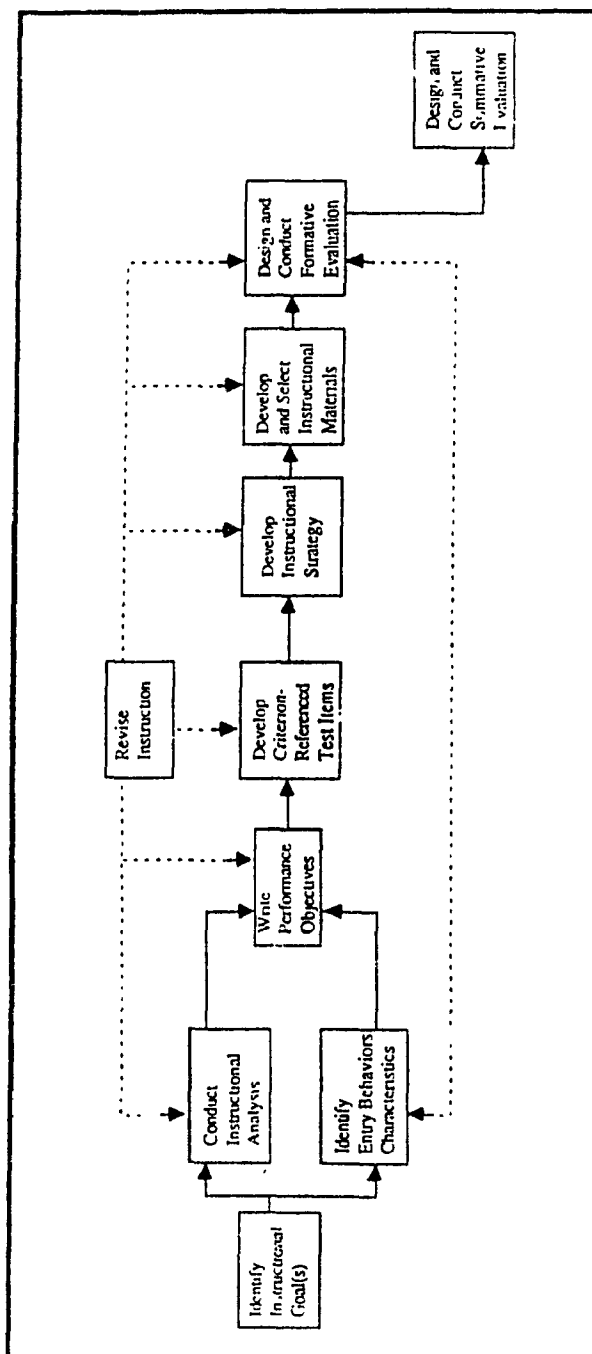


Figure 1: Instructional design model from the field of education (Dick and Carey, 1985)

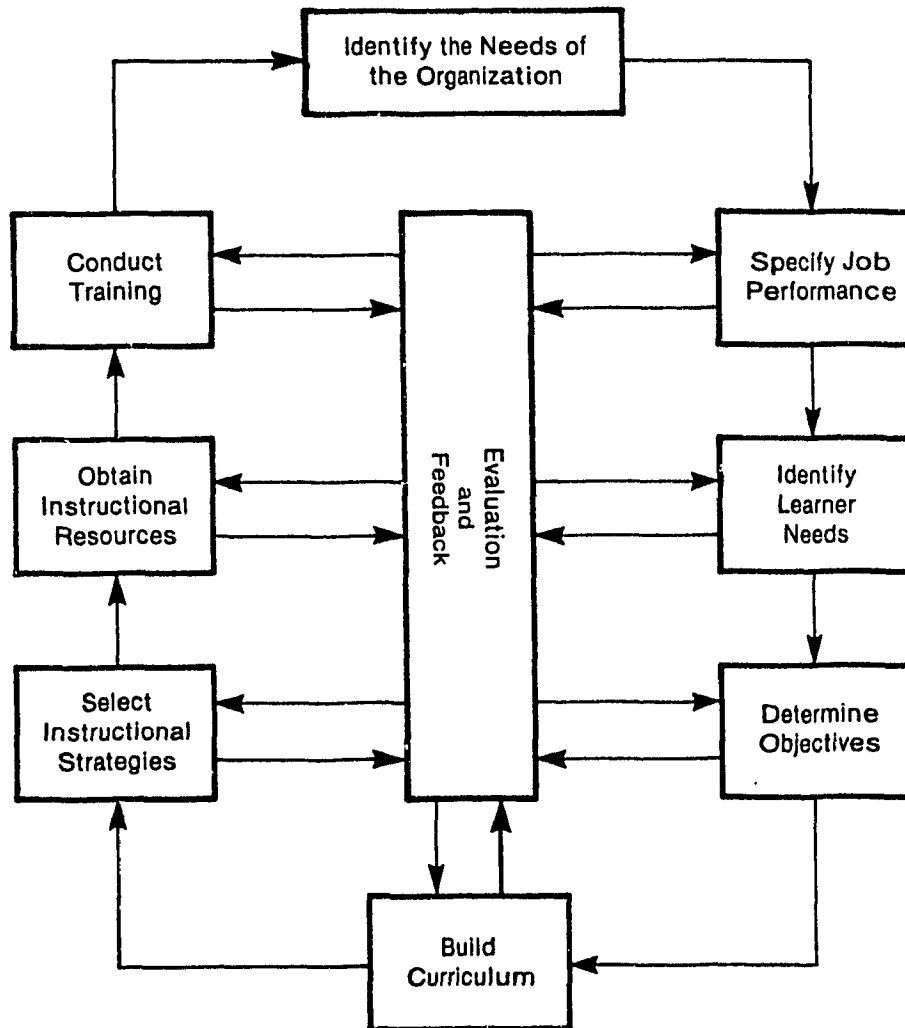


Figure 2: Instructional design model from the field of training and development (Nadler, 1982)

the participants? We believe that it is the effectiveness of the interaction between the people involved in the system, not just the power of the person(s) responsible for it. This interaction cannot be assumed, it must be planned. (p. 15).

This interaction or "helping relationship" that arises between the instructional designer and client must be the result of careful planning. It is only through the establishment of a consulting relationship that the human system can be effectively managed toward the attainment of mutually desired goals. A "consulting" relationship provides the parameters around which personal interaction can be managed. Most reference books commonly used by instructional designers present little information useful in establishing a consulting relationship (Gagne & Briggs, 1979; Dick & Carey, 1985; Romiszowski, 1981; Butler, 1972; Tracey, 1971).

Over the past several years, however, interest has grown in the instructional design field about the consultation process as it applies in instructional design efforts (Bratton, 1980). Authors have begun to point to the need for more research in the area (Durzo et al 1979; Rutt, 1980; 1984; Hedburg, 1979) and practitioners and professional associations have recognized the importance of "consulting skills" as a key competency area for the profession, (Nadler, 1980; Bratton, 1984; Deden-Parker, 1979; Schiffman, 1986). With the recent interest in consulting as a profession in general there has been renewed interest in consulting approaches to instructional design in the training field (e.g. Phillips & Shaw, 1989; Champion, Kiel & McLendon, 1990).

In general, there seems to be an increased recognition that application of the instructional design process does not necessarily guarantee an appropriate and successful solution to an instructional problem. The human system, specifically the consulting relationship, must also be fully considered (Rutt, 1984).

Consultation behavior, of course, is not a new area of study. It has an extensive literature base in business management and organizational development fields (e.g. Schein, 1987, 1988; Blake & Mouton, 1983). Before the research on consultation in

instructional design is reviewed, it is important to understand the basic process of consultation and how the instructional design effort can be viewed as a consulting activity.

The Consultation Process and Instructional Design

Consulting is a general classification which includes the various strategies and tactics used for establishing a helping relationship (Rutt, 1980). Different disciplines (psychology, organizational development, counselling, management) employ different strategies which, in turn, form the basis for a number of functional models that reflect the biases and assumptions of the various disciplines. Authors working from these disciplines have all suggested definitions of consulting (Gallessich, 1974; Caplan, 1970; Rhodes, 1974; Schien, 1988; Block, 1981).

Definitions from the field of organizational development and behavioral science, however, apply most directly to instructional design (Steele, 1975; Bell and Nadler, 1985; Lippitt and Lippitt, 1978; Schein 1988).

Steele (1975) defines consulting as "...any form of providing help on the content, process or structure of a task or series of tasks where the consultant is not actually responsible for doing the task but is helping those who are" (pp. 2-3). Bell and Nadler (1985) concur that consultation is fundamentally the act of helping but add that it is in fact a two way process of seeking, giving and receiving help: "It is the provision of information or help by a professional helper (consultant) to a help-needing person or system(client) in the context of a voluntary, temporary relationship which is mutually advantageous" (pp. 1-2). Both Steele and Bell and Nadler emphasize that consultation is aimed at some improvement in the future functioning of the client system rather than simply at getting the immediate task completed satisfactorily.

Bell and Nadler (1985) go on to define the "client" as the person responsible for the outcome of the consultation. The "client system" is the organizational unit most directly

affected by the consultation and generally led by the client. The "consultant" is defined as the "person who, because of competence, experience, status, reputation, or a combination of these, is deemed by the client to be capable of providing needed information or help. The consultant is always external to the client system but may be internal to the organization in which the client is an employee" (p. 2).

Given these definitions we can clearly consider the internal instructional designer working in higher education as a consultant. The instructional designer usually works in conjunction with a subject matter expert (SME) from the same institution on an instructional problem. It is the SME (client) and not the instructional designer who implements the solution. The instructional designer is not concerned with doing the task involved (such as teaching or running an instructional lab) but rather with helping the SME implement the tasks and solve an instructional problem more effectively (Rutt, 1984).

Similarly, the internal training and development specialist helps managers of "client" departments analyze and solve human performance problems and make recommendations for appropriate training or non-training remedies. He/she can then assist in the implementation of and evaluation of whatever solution is recommended (Laird, 1978).

In both cases, consulting may not be a strict occupational role but rather a function that can be applied within various occupational capacities (Lippitt, 1985). For example, the training and development specialist may deliver training and the instructional designer may also manage an audio-visual department, neither roles of which are consulting per se.

External instructional designers and training consultants certainly engage in more direct consulting activity consistent with the definitions provided above but do not necessarily always do so. For example, if someone is contracted simply to deliver a training program this would not be consistent with consulting as defined here. If on

the other hand, a person was contracted to help solve a performance problem and if an analysis revealed that a training program was in fact a solution, then the activity could more accurately be labelled consulting.

In all of the above cases, the relationship is temporary and mutually advantageous as defined by Bell and Nadler (1985). It is clear then, that application of the instructional design process whether provided by internal or external consultants will involve the development of a "consulting relationship" with a client or client system.

Models of Consulting

Given that the instructional designer must indeed enter a consulting relationship with a client or subject matter expert, what models of consulting can he or she draw upon? There are a number of consulting models or paradigms that exist which reflect various professional points of view. Beyond the brief generic definitions provided in the previous discussion, the goals and methods of consultation vary greatly from profession to profession and reflect the biases of each. Each consulting model differs in the assumptions that are made concerning the roles and needs of the client and the consultant as well as the ultimate goals of the professions in which they are applied. Some of the more important models and their applications are as follows (after Galesich, 1974):

Information transmittance model: The direct transmission of information with little adaptation to unique needs. The client is in need of a certain type of information or service and the consultant is expected to provide it. This model offers a convenient method for bringing knowledge to a client but often fails to effect any behavior change on the part of the organization. This model resembles the linkage model of Havelock (1971).

Medical model: The characteristics in this model are clinical diagnosis and recommendation as might take place in a doctor-patient relationship. The client organization is viewed as being "sick" and the consultant is engaged to diagnose the problem and prescribe an authoritative solution which will cure the problem. The assumption here is that the diagnosis will be valid and that the recommendations will be used. Problems can arise, however, when the client sees the recommendations as "irrelevant and/or unpalatable" (Schien, 1969, p.7). Little or no consideration is given toward any long term effect on the behavior of the client. This model obviously is derived from the field of medicine and is also popular within the area of management consulting (see Klein 1977).

Mental health model: This variation on the medical model was developed for use in the mental health profession where it has remained (Caplan, 1970). The consultant works with a mental health worker (consultee) in order to provide the consultee with improved knowledge and skills with which to assist the mental health patient. Again a weakness of this model is that the consultee who most need the help may resist using the consultant.

Program consultation: Here the consultant provides advice and expertise as assistance in the implementation of specific programs or innovations. The consultant's role is to foster the incorporation of skills and attitudes needed for attainment of program goals. This model assumes that the change process must be supported over a long period of time, but often the consultant's assistance is not internalized by the organization and tend to fade when the external support system leaves. The model is primarily employed in large scale program implementation within school systems.

Process consultation: With roots in social psychology and general systems theory, this model focuses on the processes of groups, organizations and systems. Developed by the National Training Laboratories, the model is used most extensively by management and organizational development consultants with increasing applications in

educational and training environments. The model assumes that client participation is essential to successful change. The goal is self-sufficiency on the part of the client. The consultant works with the client and, as facilitator and information source, helps to develop various problem solving and decision making skills. Schein (1988) provides the most extensive description of this model and is one of its strongest advocates.

Advocacy consultation: Within this model, which emerged as a strategy for large social systems interventions, the consultant acts as an advocate for a certain position or issue within a social system. The client becomes the "community" and the consultant functions as an agent for social change. The consultant serves the client as an educator and catalyst and also as their advocate to other institutions. Child advocates and ombudsmen working to change discriminatory policies are one example of an application.

The literature in instructional design (education and training) provides very little guidance to the practitioner as to which models or variations of models might be most effective in the establishment of a consulting relationship. Davies (1975) has provided the most extensive theoretical discussion of the instructional designer-client relationship. He suggests that the most predominant categories of assumptions guiding the instructional designer's behavior are: "product oriented", "prescription oriented" and "process oriented". These categories correspond most directly to the Information Transmittance Model, the Medical Model and the Process Model respectively. Specific research which has been conducted in the area of consultation in instructional design is reviewed in Chapter II.

Common Phases of Consulting

Independent of the consulting model an instructional designer operates within, there are a series of stages or phases through which all consulting relationships pass.

The consulting literature reveals wide variety language used by experts to describe these stages and the models or conceptual frameworks in which they occur. For example, Bell and Nadler (1985) present five distinct phases of consulting as follows as follows:

1. Entry
2. Diagnosis
3. Response
4. Disengagement
5. Closure

Lippit and Lippit (1978, pp. 8-9) describe six major phases in their model:

1. Initial contact or entry
2. Formulating a contract and establishing a helping relationship
3. Problem identification and diagnostic analysis
4. Setting goals and planning for action
5. Taking action and cycling feedback
6. Contract completion: continuity support and termination

Peter Block (1981) presents a business oriented picture of the consulting process used by many training and development consultants. He identifies five distinct phases of consultation. They are:

1. Entry and contracting
2. Data collection and diagnosis
3. Feedback and the decision to act
4. Implementation
5. Extension, recycle or termination

The similarity between the phases presented above and indeed with other authors in the area is obvious. All point to an early "feeling out" stage where expectations, goals, perceived needs and often contractual negotiations are discussed. From there the

relationship moves to one of diagnosis/analysis, problem identification and data collection. With an accurate problem assessment in place the consultant and client can develop and implement a plan to solve the problem (instructional or otherwise). Finally, the process moves to an evaluation phase where results are assessed and based on those results a continuation or termination of some sort is negotiated.

The Training Consulting Service of Ontario's Training Strategy

As mentioned, this study investigates the consultation styles used by training consultants who administer the Ontario government sponsored "Training Consulting Service". It is important therefore to provide some background of the components and structure of this service.

In 1986, the Government of Ontario through the Ministry of Skills Development established a broad-based strategy to make training and skills development a planned strategic investment in Ontario's future prosperity and competitiveness. (Breaking New Ground, 1986). The strategy has five main components:

1. Training Consulting Service
2. Incentive Funding for Training Activity
3. Trades Updating Courses
4. Training Access Programs for Literacy and Basic Skill Areas
5. The Ontario Training Corporation (to develop training products/services).

The Training Consulting Service (#1. above) is the focus of this study. The goal of the consulting service is to "...provide expert advice to firms to create competitive training strategies for their workers. The service helps firms identify training needs and develop training plans." (Breaking New Ground, 1986; p. 18). To meet this goal, the training consulting service provides professional advice and assistance with the following training and development tasks (Ontario Skills Development Offices 1988-89 Operating Guidelines, p. 4):

1. Conducting training needs analysis.
2. Facilitating the process of human resource planning.
3. Developing and validating training plans outlining the training required to meet the levels of competence specified in the needs analysis. The training plan documents the phases of the training design process as follows:
 - needs analysis
 - task analysis(job descriptions)
 - performance objectives
 - knowledge and skill requirements
 - training delivery criteria
 - evaluation methodology.
4. Training plan implementation (identifying training/education resources in the community to meet the needs identified in the training plan).
5. Conducting follow-up and evaluation of the training.

Ontario Skills Development Office (OSDO) Training Consultants

The services described above are delivered to Ontario businesses through a network of "Ontario Skills Development Offices" managed by community colleges throughout Ontario. The Ontario Skills Development Offices are staffed by training consultants skilled in the application of instructional planning and design methods. Consultants are expected to have the ability to deliver the services described above. The responsibilities and skill requirements of the consultants very closely parallel the tasks and competencies of U.S. federal training consultants described by Chalofsky (1985). According to the definitions of consulting provided earlier in this chapter, The OSDO training consultants are "external consultants" who enter into consulting relationships with their client systems (Ontario's small/medium size businesses) in order to help the client companies integrate training planning strategies.

Implicit and Explicit Assumptions of the Training Consulting Service

The explicitly stated goal of the training consulting service is to develop a "training culture" within Ontario businesses and industries. "Over the long term, the development of this expertise will result in the creation of a training culture in Ontario, a more skilled and flexible workforce and productivity gains at the individual and macro level of the economy" (Ontario Skills Development Office 1988/89 Operating Guidelines, p. 2). The assumption is that the service will increase not only the amount of training done in Ontario but also the effectiveness of the training. It is anticipated that demonstrated economic benefits of well planned and integrated training will convince individual employers to incorporate training and development in methodology into their business philosophy.

In order for a business to do this, they must acquire the ability to implement training and development methodology without the assistance of a training consultant. This is critical considering that the training consulting service is available to clients for a one year period from the date of initial registration (although this is renewable depending on the progress of the client at the completion of the first year).

The Training Consulting Service recognizes this and guides the training consultants to "assist registrants to acquire the skills and knowledge to perform these functions on their own, following the withdrawal of the training consulting service." (Ontario Skills Development Office 1988/89 Operating Guidelines, p. 3).

Though not explicitly stated, the training consulting service as described above is clearly based on the process model of consultation described earlier in the chapter. Client participation is seen as essential to successful change and the goal is self-sufficiency on the part of the client. The consultant works with the client as facilitators and information sources to help develop client skills and awareness of instructional planning and design

methods. The goal is clearly not to provide a product to the client in the form of a training plan designed and written by the consultant.

The consulting service is also consistent with the definitions of consulting provided earlier in that the help provided by the consultant is temporary and aimed at some improvement in the future functioning of the client system rather than simply getting the immediate task completed satisfactorily. The consulting process of the Ontario Skills Development Office Training Consultant is illustrated in figure 3.

Design vs. Implementation of the Training Consulting Service

The Training Consulting Service as described above is a design by the Ministry of Skills Development (Ontario) to meet the goal of achieving a "training culture" in Ontario. As designed, the program requires a high level of consulting and instructional design skills on the part of the consultants delivering the service. To be successful, the program would also require a significant level of client commitment and belief in the quality of advice provided by the consultants. To date, there has been no measure as to whether a process model of consulting is actually being used by the consultants delivering the service or whether the consulting service is in fact achieving its goal.

The purpose of this study is to investigate the consulting style or models being used by the training consultants during the various phases of the consulting process. In doing so, the study will also provide some indication of whether the consulting service is actually being implemented as designed by the Ministry of Skills Development.

Summary

This chapter has provided background information essential to an understanding of the problem being investigated. It has included a discussion of the relationship between educational technology, instructional design and training development, of the nature of

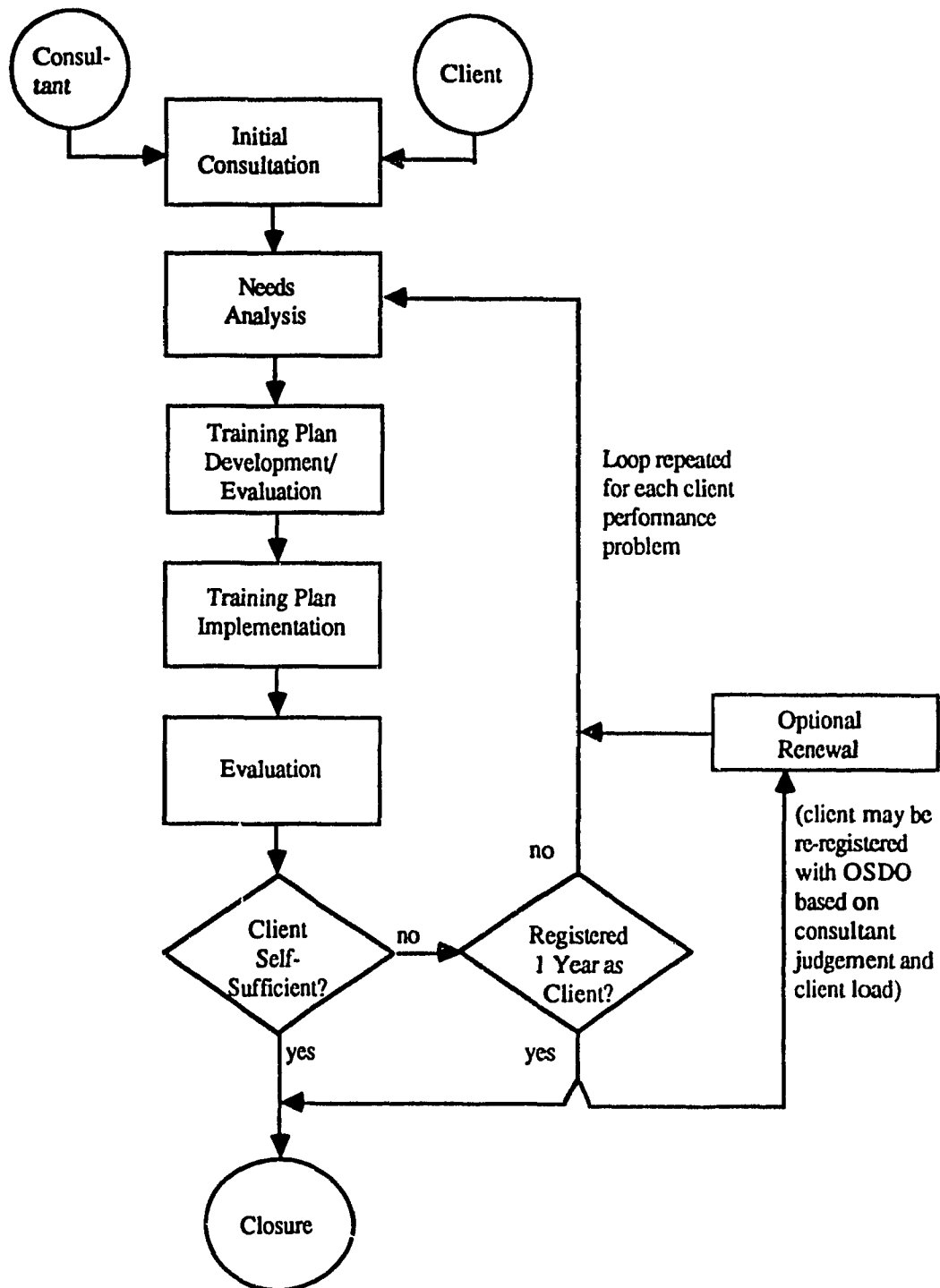


Figure 3: The Consulting Process of the "Training Consulting Service"

consulting in instructional design and training situations and of the general models and phases of consulting that might be used in instructional design.

The next chapter reviews the specific literature on consultation as it applies in the instructional design and planning process.

CHAPTER II

REVIEW OF RELATED RESEARCH AND PROBLEM STATEMENT

The present study attempts to determine the consulting styles or models used by training and development specialists. In this chapter, the current status of research in consultation behaviors in the instructional/ training design process will be examined; first through a look at work in the broader area of client relationships and second, a review of the literature specifically related to consultation models and phases in instructional design. Finally, a specific problem statement for the study is presented.

Client-Instructional Designer Relationships

Until recently the research literature in instructional design (in both training and education) has contained little that describes the consulting role of the instructional designer. The research that has been conducted has largely involved consulting behaviors of instructional designers in higher learning institutions. Reports in the training world have been largely anecdotal accounts published in professional journals.

Coscarelli and Stonewater (1980, 1984) categorized clients (subject matter experts) in terms of their decision-making style with the assumption that if an instructional designer is aware of a client's decision-making style, more appropriate consulting relationships might be formed. Drawing on theory of decision-making types in counselling settings (Johnson, 1978), the authors asserted that the client's decision-making style can be charted on a two dimensional matrix: information gathering (systematically or spontaneously) and data analysis style (internal or external). They described four examples of verbal instructional designer/client interactions to demonstrate each type. They concluded that communication and consulting problems

between consultant and client are often due to a misunderstanding of the client's characteristics on the part of the instructional designer.

Rosenberg (1978) suggested that instructional designers (instructional media specialists) may use verbal behaviors which are judgmental and discourage client participation. Alternatively they could communicate in ways that indicate concern and invite client involvement. Rosenberg proposed that the designer - client relationship could be studied by analyzing the verbal interactions that took place. A system for coding was suggested which described various categories for instructional designer and client dialogue. There was no report on application of this coding system.

Price (1976) conducted a study which recorded actual verbal behaviors of instructional designers as they met with their clients for the first time. The interviews were recorded and coded by independent judges according to a classification system which contained a number of subcategories as follows: a) four consulting phases (introduction, problem identification, solution, discussion, closing); b) six content categories (subject matter, objectives, teaching methods, media, evaluation methods, other); and c) twelve categories of process utterances (reinforcing, soliciting, prompting, explaining, opinioning, clarifying, informalizing, structuring, summarizing, declaring, dispensing, other). The results showed several common behaviors regardless of the client's situation. The largest percentage of comments were made in the solution discussion phase; the content of the discussion was most frequently on instructional methods (strategies) and the process behaviors consisted mostly of explaining and offering opinions.

Price (1984) in a later report (based on his earlier findings) has described several crucial aspects of the initial stage of the instructional designer/client relationship which have direct impact on the future of the relationship. They are: 1) determining why the client has sought assistance; 2) the rationale for testing assumptions and clarifying

expectations; 3) contracting with the client; 4) establishing monitoring procedures for the working relationship; and 5) danger signals for potential client problems.

Similar to Price (1984) there are many other accounts which provide "tips" or suggestions for skills that can be employed to improve client interactions. These are common in the training and development literature and are also found in the educational literature. For example, methods of employing contracting techniques with clients appear often (Leitzman et al 1979; Lippit and Lippit 1978; Price, 1984; Spottswood 1980). Summaries of the "people skills" required for effective consultation also appear regularly (e.g. Dedan-Parker, 1979; Bratton, 1984; Bellman, 1983).

A recent report (Champion et. al., 1990) suggests that training professionals must select an appropriate consulting role based on the organizational situation, the characteristics of the client, the characteristics of the consultant and the client-consultant relationship. Consulting role options include nine possible models ranging from low intervention to high intervention as follows: counsellor, facilitator, reflective observer, coach, teacher, technical advisor, partner, modeler, and finally hands on expert.

Consultation Models in Instructional Design

Although models of consultation have not been explicitly discussed in the instructional/training design literature, a number have been implied. The general models that have been identified in Chapter I include the Information Transmittance Model, the Medical Model and the Process Model. The model choice implied in most instructional design literature is the process model (Rutt, 1984). Yet, truly discriminating decisions by training consultants as to consulting model they will use in any given situation is probably quite rare.

Drawing on these general models Davies (1975, 1979) has presented the most extensive theoretical discussion of the instructional designer/client relationship. He argued that the fundamental role of the instructional designer is giving advice to clients

and then allowing the client to make the final decisions. He discussed the relationship in terms of dominant assumptions (or models) that the consultant brings to the interaction. These dominant assumptions are: Product Oriented, Prescription Oriented and Product-Process Oriented. These categories correspond most directly to the Information Transmittance Model, the Medical Model, and the Process Model, respectively as discussed in Chapter I.

In Davie's product model the client provides the instructional designer with an explanation of what is needed and leaves it to him or her to create the solution. Interaction is minimal. In the Prescription Model, the relationship is analogous to that of the physician and patient with the client's "sickness" to be cured by the instructional designer's expertise. The Product-Process Model employs elements of both these models but views the relationship as:

"...A system of decisions, reached by agreement, concerning what is expected in terms of both the results to be achieved and the changing roles to be exercised as advice is given and accepted. The relationship is essentially a dynamic one as compared with the static relationship assumed in the previous models, continuously changing until a final termination is achieved. (Davies 1975, p. 359).

Other authors have used parallel classifications in both education and training, and business consulting environments. For example, Tilles (1961) used three similar categories for business consulting relationships and labelled them Purchase/Sale, Doctor/Patient and Constructive, respectively. Schien (1969) working in organizational development field proposed three possible consulting relationships: The Purchase Model, the Doctor-Patient Model and the Process Model. Kurpius (1978) and Kurpius and Brubaker (1976) in their discussions of psychoeducational consultation suggested four consulting "modes": Provision Mode, Prescription Mode, Collaboration Mode and Mediation Mode. Using these same classifications Hedberg (1980), adapted these consulting "modes" to an instructional design environment.

All authors, however, point out that the models of consultation are simply logical categories in which to place common types of consulting behavior. The models are not

mutually exclusive or necessarily complete. In all cases, they depend on the assumptions of the client and consultant.

Rutt (1980,1984) investigated the consultation models used by instructional design practitioners through the use of a consultation style inventory developed by the author; the "Instructional Development Consultation Styles Survey" (IDCSS). The inventory contained a series of instructional designer-client scenarios upon which subjects were asked to select one of several alternative statements of action in response to the scenario. Each statement described a behavior typical of one of four theoretical consultation models drawn from the literature described above. Rutt identified four models which he felt most accurately represented and communicated the role of the instructional designer. They were Product model, Prescription model, Collaborative/Process model and Affiliative model.

The assumptions behind the Product, Prescription and Collaborative models parallel those described by Davies and are summarized above. Rutt added the Affiliative model to describe consulting relationships where the consultant emphasizes good interpersonal relations with the client at the expense of task accomplishment. The consultant using this model is concerned with pleasing the client, avoiding conflict, and maintaining a well ordered environment. This latter category was based on Blake and Mouton's (1978) managerial grid work.

In addition, response statements representing each of these models were presented to the subjects for each phase of the consulting process which Rutt defined as 1. Entry; 2. Analysis & Diagnosis; and 3. Solution (again derived from the literature). The matrix in Figure 4 displays the interrelationship between phases and consultation models as used by Rutt. Rutt used this matrix as the basis for development of his IDCSS response statements.

The major finding of the study was that in general, instructional designers working in higher education environments equally favoured the product, prescriptive,

CONSULTATION MODELS

		Product	Prescription	Collaborative/ Process	Affiliative
PHASES	Entry				
	Analysis/ Diagnosis				
	Solution				

Figure 4: Consultation matrix used by Rutt (1979) to generate response statements for his IDCSS

collaborative/process and affiliative models. When an instructional problem was at the curriculum or system level, however, instructional designers tended to use the product model. If the problem was at the unit level and involved some sort of media augmentation then collaborative/process models were used. Also, instructional designers chose to move from a product model orientation to a more collaborative/process orientation with the client as the relationship progressed.

Phases of Consulting in Instructional Design

As described in Chapter I, it is generally accepted that most consulting passes through a series of distinct phases. Much of the early literature in this area was again in the field of organizational development (e.g. Schien, 1969; Lippit & Lippit, 1978).

There are a few studies, however, which have looked at consulting phases specifically in the area of instructional design. Davies (1975,1979) in his theoretical discussion of consultation models grouped "instructional development relationship activities" under three broad headings:

1. Entering a consulting relationship
2. Maintaining the relationship
3. Terminating the relationship

Entering into a relationship includes initial contacts with a client and the negotiation of a formal and/or psychological contract. Maintaining the relationship consists of three phases: a) diagnosing the client's real or perceived needs; b) offering alternative courses of action to the client; and c) implementing a chosen course of action. The terminating stage consists of a review and evaluation of the relationship with eventual reduced involvement or complete termination.

Hedburg (1980) similarly identified four phases in the development of a consulting relationship in instructional design: 1. creating the relationship; 2. identifying expectations and goals; 3. managing the ongoing relationship; and 4. concluding the

relationship. Hedburg also provides suggestions or "tips" how to make effective decisions within each of these phases.

Rutt (1979), as mentioned, defined instructional design consultation phases as: 1. Entry; 2. Analysis/Diagnosis; and 3. Solution based on a review of Brokes (1975), Kurpius and Brubaker (1976), Davies (1975) and Schein (1969, 1978). Rutt felt that a consultant's choice of consultation model might depend on the emphasis placed on a specific phase within certain models; that, consultants may in fact behave differently depending on the phase of consulting they were engaged in. Rutt used this rationale to include response statements in his inventory representing each of the various models of consulting for each consulting phase as diagrammed in Figure 4.

Consultants in training and development environments have tended to use consulting phases from organizational development. Bell and Nadler (1985) and Lippitt and Lippitt (1978) are good examples. Their phases of consulting are summarized in Chapter I.

Again, the phases described in the literature both in the education and training are remarkably similar and have likely had overlapping histories of development.

Models of Consultation Used in this Study

Drawing on the sources presented above, the three models of consulting that are used in this study are: product model, prescription model, and process/collaborative model. These "models" were used to categorize the consulting behaviors of the training consultants surveyed in the study. The models are most directly related to those used in the Rutt (1979) study. Their associated behavior assumptions will now be discussed.

Product model behavior: As the label suggests, this consulting style is heavily product-oriented. Very often the client has made up his/her mind about the best solution in advance and is searching for a "product" that will meet the identified need. The consultant is expected to "deliver the goods" as requested which will usually take

the form of information, a service, or a product (e.g. identify training sources, design a training plan, produce training materials).

In all cases it is assumed that the client has correctly identified the problem and objectively identified the appropriate solution (Davies, 1975).

This model may be appropriate if the problem has, in fact, been clearly diagnosed by the client. The consultant can simply provide what is necessary to implement the solution. If, however, the goal is to influence the long term behavior of the client organization, there are problems inherent with this model. A consultant using this model would likely not disrupt the normal routine of the client while the service or product is being provided. It is also unlikely that the client would become constructively and collaboratively involved in the consulting process and, thus, not become committed to purposeful change in the organization (Rutt, 1979).

A consultant who is less confident in his/her analysis/decision making ability may be more likely to provide consulting services using this model (Hedburg, 1980).

Prescription model behaviors: Under the prescription model the client generally presents the consultant with a problem and asks the consultant to diagnose and suggest a solution (e.g. "my line supervisors don't seem to be able to motivate the workers and production is down"). In this mode the client is assumed not to have the skills to diagnose the problem and, as a result, the responsibility for project management and the effectiveness of the "prescription" is clearly with the instructional designer. It is assumed that the consultant has the authority and skills to carry out a diagnosis and that the solution will be accepted by the client.

The model is clearly based on a medical model but can be potentially difficult for the consultant. As Schien (1978, p. 350) points out, the model assumes that the client has correctly interpreted the "symptoms", that the client is willing to accept and implement whatever "prescription" is given and that the "patient/client" will be able to remain healthy after the "doctor/consultant" leaves. When the client is unable or reluctant to

accept or implement the suggested solution, any long-term effects upon the client organization may be minimal.

Many instructional design/training consultants by virtue of their specialist training tend to operate in the prescriptive mode and many clients prefer the prescriptive or product models (Hedburg, 1980). The shortcomings of the above models in achieving long term organizational results suggest more process oriented approaches which rely on greater client involvement. Such approaches will more effectively help the client master the new skills or behavior required for long term change to take hold (Rutt, 1984).

Process model behaviors: The essence of this model is that the client is involved in the diagnosis of the problem and the generation of the solution. It is assumed that the client requires help with the diagnosis of the problem and will benefit from participation in the solution (Schein, 1969). The instructional designer/training consultant helps the client (who still owns and controls any changes in the project) to view the relationship as a "... process directed towards the achievement of some mutually agreed and valued instructional result in accordance with the organization's mission" (Davies, 1975, p. 359). The process involves a system of decisions which are reached by agreement concerning what is expected to be achieved, the nature of the help required and the changing roles that will be exercised (Rutt, 1979).

The success of this model requires a working relationship which respects the professional role of each participant. It assumes that the client/consultant roles within the relationship can be negotiated to mutual satisfaction by both parties.

The goal of this model is to increase trainee achievement consistent with organizational objectives. A second equally important goal, however, is to enable the client to apply the skills learned during the performance analysis/instructional design process to future performance and instructional problems. This will hopefully reduce

and eventually eliminate the need for consultant involvement in future projects. The advantages of this model of consulting to the training consultant are obvious:

- clients generally become more effective in the future if they participate in defining and selecting an appropriate solution for solving a problem in the present
- collaboration while sometimes conflict producing, tends to build lasting trust and respect among professionals
- collaboration, also demonstrates equal power authority and status; consultants are not better or expert, they merely have different roles
- problems once solved using collaborative methods are more likely to remain solved (Kurpius, 1978, p. 336)

Problems, however, can arise in use of this model if any of the following conditions exist:

- the scope of the project or the available time is limited
- the client is not receptive to the openness or collaborative demands of the relationship
- the consultant does not feel comfortable using the model (Rutt, 1984)

The Process model is clearly the model upon which the Training Consulting Service (as described in Chapter I) is based. Figure 5 summarizes the assumptions underlying each of the consulting models discussed above.

Phases of Consultation Used in This Study

Rutt (1979) drew the conclusion that "the differences between consultation models - used by consultants - will be with the emphasis placed on a particular phase within a certain model. The different emphasis is manifested in the consultant's behavior during the phase" (1980, p.12). In any study investigating consulting models, it will

	Product Model	Prescription Model	Process Model
Goal Orientation	transfer of information or product sourcing	"expert" diagnosis of problem and prescription for solution	Solution of agreed upon problem and development of client training planning skills
Role of client	specifies problem and solution	identifies problem area and requests help in diagnosis of true problem and solution	works with consultant to define role based on mutually determined problem situation
Consultant Role	provides knowledge or product as requested by client	acts as authority/expert in the identification, diagnosis and prescription for solution	functions as facilitator, professional resource, and information source
Method for bringing about change in training planning methods	meets needs of client as defined by the client	provide "expert" solution for diagnosed problem	negotiated relationship with emphasis on client involvement

Figure 5: Assumptions underlying each consulting model

be important, then, to identify the consulting model being used during the various phases of the consultation process.

The phases of consulting used in this study are based on the consulting literature presented above and will be labelled as follows:

1. Entry
2. Analysis
3. Solution
4. Evaluation

Entry: The client and consultant get to know one another, jointly establish the nature of the problem, discuss perceived needs and symptoms, clarify goals, roles and methodology for solving the problem. A written or verbal contract is often negotiated.

Analysis: The client and consultant work together to determine the cause and nature of the problem. It usually begins with the understanding of the problem as perceived by the client. The consultant uses various data collection and analysis methods to clarify the exact nature of the problem such as interviews, questionnaires, observation, performance data, etc. Formal data feedback and presentation of possible response/solutions are made during this phase.

Solution: With an accurate problem assessment in place the consultant and client develop and implement a plan to solve the instructional/performance problem. The response or solution phase includes the selection of a course of action. The plan outlines structured activities and interventions (training) to correct the problem or improve the situation which was identified in the analysis. This phase also includes assisting the client to select and implement the training required to meet the needs spelled out in the plan of action.

Evaluation: In this phase an evaluation of training results is conducted to determine not only if the training has been successful. It also serves to determine if there is a need for remediation, revision or additional resources. Based on that evaluation, planning

for continuous process maintenance is conducted to ensure permanent integration and lasting results. An effort is made to decrease the client's dependency on the consultant and develop within the client system the ability to monitor and evaluate their own progress. "The challenge of the helpers is to bring the party being helped to a point at which a helper is no longer necessary" (Bell and Nadler, 1985; p. 4).

The phases of consulting presented above were selected because they most closely resembled the consulting process used by Ontario Skills Development Office training consultants (see figure 3). Each phase presented above corresponds directly to a step prescribed in the OSDO consulting service:

<i>Consultation Phase</i>	<i>OSDO Consulting Step</i>
1. Entry	1. Initial Consultation
2. Analysis	2. Needs Analysis
3. Solution	3. Training Plan Development/ Implementation
4. Evaluation	4. Evaluation/Follow-up

Problem Statement

The literature reviewed in this study indicate that little formal research has been conducted to determine the consultation models/behaviors used by instructional designers. The studies that have been carried out have largely involved instructional design applications in higher education (Rutt, 1979, Coscorelli & Stonewater, 1979). No studies have investigated the consultation models used by training consultants in business environments. The proposed study will provide such an investigation in a very specific training and development environment: The Training Consulting Service of Ontario's Ministry of Skills Development.

Much of the literature reviewed on the consulting process assumes an ideal consulting model using a process/collaborative model as the model of preference. There is no evidence that the process model of consultation is in fact the model actually being used by instructional design/training consultants. In fact, Rutt (1979) found that a significant amount of "model switching" takes place. Hedburg (1980) suggests that most instructional design consultants would tend to operate within the prescriptive mode by virtue of their specialist training.

Ontario's Ministry of Skills Development promotes the goals of "transfer of training planning skills" and "client self sufficiency" for the Training Consulting Service (Ontario Skills Development Office operating guidelines, 1988). The consulting model required for the goals to be achieved is the process model. There has been no studies conducted, however, to determine if the training consultants administering the service are in fact providing process oriented consultation.

It is reasonable to assume that there will be factors within the consultants task environment that could have an influence of the consulting models used. This study will look at two of these: phases within the consultation process (as discussed in this chapter) and the perceived expertise of the client in training planning skills. The literature on consultation styles in instructional design has not studied the possible influence of various client dimensions on consulting styles used by consultants. Rutt (1984) has in fact suggested that client factors would be an important area for further research.

Considering the above, this study has the following goals:

1. To provide an initial investigation of the consulting models used by training consultants in a business environment.
2. To determine the extent to which Ontario Skills Development Office training consultants are using the "process" model of consulting as prescribed by the Ontario Ministry of Skills Development.

3. To identify any relationships between consulting model used and the phase of consulting in which the consultant is engaged.
4. To identify any relationships between consulting model used and consultant's perceptions of the client's training and development expertise.

CHAPTER III

METHOD

Subjects

The population for this study was Training Consultants employed at the Ontario Skills Development Offices at each of Ontario's 22 community colleges. The training consultants are responsible for providing the Training Consulting Service component of Ontario's Training Strategy as described in chapter I. The entire population of 192 Ontario Skills Development Office Training Consultants were mailed the consulting style questionnaire described below. The questionnaire was returned by 147 subjects for a return rate of 76.6%.

The background and experience of the training consultants ranged from individuals who have worked in the college system for a number of years to those who have had extensive private sector experience. Educational backgrounds of the subjects were equally varied. Many have college or undergraduate university education in business or social sciences but a significant number also have less formal education and extensive business experience. All were involved in a professional development program designed by the Ministry of Skills Development to develop consulting, needs analysis, human resource planning and basic training design skills.

Measurement Instrument

The study attempts to identify consulting behaviors used by the training consultants described above. These behaviors, once identified were categorized according to the models and phases of consulting described in Chapter II. One way to examine the behavior of consultants is to observe and record the actual behavior occurring during the consultant/client interaction. Price (1976, 1984) for example, observed and

recorded the actual verbal behavior of instructional designers during their initial meeting with a client. An alternative approach is to develop a questionnaire or survey instrument that provides training consultants with a number of scenarios they might encounter with clients and a range of possible responses to the scenario. The advantages of this method are:

- the scenarios can be designed with greater control than is possible in field situations
- the responses could be tailored to reflect the consulting models identified
- a wider and more diverse sample of training consultants can participate than with observational methods.

A common concern with such instruments however is the problem of inferring actual behavior from self reports. If, however, steps are taken to determine validity of the instrument this concern can be reduced. An instrument which successfully identifies training consulting behavior must contain the following:

- case scenarios which are familiar to consultants and which accurately reflect their environment
- response alternatives which are representative of behavior typical of the consultation models described earlier
- a mechanism for recording responses which enables the subjects to reflect their behavior accurately and allows for the use of standard statistical analysis to study the responses.

Behavior recording instruments exist which meet some of these format requirements. Arbes (1972) developed the Intervention Style Survey to examine the intervention styles of student personnel, administrators, counsellors, faculty and students. The theoretical framework for these styles was based on the managerial grid developed by Blake and Mouton (1978). Using the Arbes survey as a model, Rutt (1979) developed a survey even closer to the needs of the present study. Rutt's

"Instructional Development Consultation Style Survey" (IDCSS) provided a series of scenarios and response alternatives similar to the needs represented above. The IDCSS served as the model for the instrument that was developed for the purposes of the present study: the **Training Consultation Style Survey (TCSS)**.

TCSS Design and Development: The Training Consultation Style Survey was designed to measure the variables of interest in this study accurately. These variables and their levels are:

1. Consulting Models: Product orientation; Prescriptive orientation; Process orientation.
2. Consulting Phases: Entry; Analysis; Solution; Evaluation.
3. Client Expertise: Inexperienced; Moderately Experienced; Experienced.

The TCSS (see appendix B) presented subjects with a series of three familiar client situations. After reading each client situation the subject was required to select one of three possible statements which most closely described his or her actual behavior given that client situation. The statements described behavior consistent with each of the three consulting styles described above. The subject was required to choose one statement (from 3 presented) for each of the four phases of the consulting process. For each client situation, then, the subject was presented with four groups of three statements each. A detailed description of the major components of the TCSS and how these variables were manipulated within them follows.

Client Consultation Scenarios: It was important in developing the TCSS scenarios that they reflected real consulting situations OSDO training consultants encounter. To ensure this, the scenarios were written based on actual case studies developed by OSDO training consultants as part of a professional development seminar they attended. Three case studies were selected to reflect a diverse range of client consulting situations

in various economic sectors. The case studies, once selected were edited into a format suitable for the TCSS. Based on Rutt (1979) the following contextual factors were taken into consideration in the design of the scenarios to ensure a uniform presentation:

1. **Background:** the background of the performance/instructional problem was provided.
2. **Client:** the name of the client was included along with information about the client's experience/expertise in training and development.
3. **Organizational Level:** all scenarios were written in a way to make it clear the client was an individual with decision making empowerment (e.g. management level)
4. **Time:** each scenario was written so as not to suggest a crisis situation.
5. **Problem:** each scenario contains a reference to the problem situation and a suggested solution advanced by the client upon which the consultant is expected to act.

These five points of information ensured that the same type of response cues existed in each case scenario. The last two items, time and problem, were particularly important. A crisis situation was not suggested because it might cue the subject to assume that a comprehensive consulting intervention was not required. Having the client define the "problem" and ask for help from the consultant, set up an action orientation on the part of the subject which was required for the TCSS questions that followed.

The three client scenarios that were created all contained the above contextual factors. However, the client scenario descriptions were also used to manipulate the "client expertise" condition by embedding key information about the client's experience in training and development. The scenarios differed then, as follows: one scenario described a client with no training and development expertise, another with moderate expertise and a third with extensive expertise. Client scenarios were presented on the final TCSS in random order.

Phases of Consultation: After reading the client scenario the subject was required to choose a response statement (consulting style) for each consulting phase that would ensue in that situation (entry, analysis, solution, evaluation). Consulting phases were presented in sequential order. Identical prompts were provided for each scenario to clearly indicate what phase of consulting the consultant was in:

- | | |
|--|--------------|
| During the initial consultation with the client I would: | (entry) |
| In conducting the needs analysis I would: | (analysis) |
| Assuming training is an appropriate solution I would next: | (solution) |
| In conducting the evaluation of the training I would: | (evaluation) |

Response Statements: Each of the above prompts was followed by three possible response statements. The subject was directed to choose the one that most closely described his or her actual behavior in that situation. The subject's choice determined his or her consulting style or model for each phase of the consulting process. The matrix in figure 6 presents the relationship between the three consulting models and the four phases of consulting used to generate the responses for the TCSS. One statement was written for each cell representing a typical behavioral response to the consulting situation. The statements were written in behavioral terms using action verbs representing responses that could be expected under each consulting style in each phase of consulting. The assumptions underlying each of the consulting models as described in figure 5 were used as a general guide when constructing the response statements.

The final response statements were presented in random order within each phase of consulting.

CONSULTATION MODELS

		Product	Prescription	Collaborative/ Process
PHASES	Entry			
	Analysis			
	Solution			
	Evaluation			

Figure 6: Consultation by phases matrix used to develop response statements for Training Consultation Style Survey

Face Validity Pilot Test In order to ensure that the TCSS response statements had face validity a draft TCSS was presented to 6 validity judges (five OSDO training consultants and one educational technologist). Beside each response statement the judges were asked to indicate whether the statement accurately communicated behavior representative of each model of consulting (yes/no). The judges were instructed on the assumptions underlying each model and were provided with a consulting model summary sheet to assist them in making their judgments (see figure 5).

After the results of the validity test were reviewed, a discussion was held with each judge to identify appropriate changes or modifications. At least two of the six judges had to indicate a problem with a response statement before it was changed. If the modifications were serious enough to warrant changes in content rather than style, the revised statement was again discussed with each of the six judges. As a result of these discussions, three statements were changed in content and one in style. The consultation scenarios in being based on actual case studies developed by OSDO Training Consultants were considered valid. The final TCSS can be found in Appendix B.

Procedure

The TCSS with cover letter briefly explaining the study and instructions for completion was mailed to 192 Training Consultants working at Ontario Skills Development Offices across Ontario. A package of TCSS's each with return envelopes attached was sent to the Office Manager with a cover letter explaining the study and a request for help in distributing and returning the surveys (see Appendix A). A deadline of three weeks was used with a follow up phone call after the first week.

Data Analysis

The TCSS was designed to solicit responses which allow the training consultant to be categorized according to consulting style. The forced-choice format of the questionnaire resulted in nominal data. Since the study is descriptive in nature and seeks to classify behavior into categories, only descriptive statistics were applied. The specific analysis that were conducted are as follows:

1. Overall response rates for each model of consulting. In order to determine the overall consulting style tendencies of the population, the frequency of product, prescriptive and process responses were collapsed over phase of consulting and client experience conditions.

2. Determination of individual consulting styles. Another approach to help determine the general use of consulting styles is to categorize each subject by their personal consulting style. This provides a more individualistic assessment of the types of consulting models being used. Each subject in this study was therefore defined (categorized) as one of "product oriented", "prescriptive oriented" or "process oriented" if at least 7 of 12 responses (58%) fell into any of these categories. They were defined as "mixed" if they did not choose at least 7 responses in any one category. This categorization was arbitrarily determined by the author. It was assumed that 58% of responses falling into any one category indicated a clear orientation towards that consulting style.

3. Multiple response analysis. The above analyses were designed to provide an indication of overall consulting style independent of the other variables of interest in the study (phase of consulting and level of client expertise). Cross tabulations were also

conducted to determine if there are any trends in consulting style depending on the phase of consultation the consultant is engaged in (entry, analysis, solution, evaluation) or the level of training expertise of the client (inexperienced, moderately experienced, experienced). Finally cross tabulations were also conducted to determine the trends in consulting model responses made during each phase of the consulting process within each client condition.

CHAPTER IV

RESULTS AND DISCUSSION

Overall Response Rate

The overall response frequencies for each consulting category are provided in figure 7. The analysis indicates a mixed use of consulting models (product, prescriptive, and process) with a tendency towards a process orientation.

Individual Consulting Style

The results of this analysis are presented in figure 8. They reinforce the results of the overall response analysis presented in figure 7 in that it seems most training consultants are using a variety of consulting models. The majority of consultants (62.6%) did not choose at least 7 responses that were consistent with any consulting model category and therefore have a "mixed" consulting style. 30.6% of consultants were process oriented, 6.8% were product oriented and no consultants were prescriptive oriented.

Multiple Response Analyses

The above analyses clearly indicate that OSDO consultants are using a variety of consulting models. The next obvious question is under what conditions does a consultant choose one model or style of consulting over another? To answer this question multiple response analyses were conducted on the data to determine the percentage of product prescriptive and process responses in each level of the independent variables of this study: phase of consulting and client expertise.

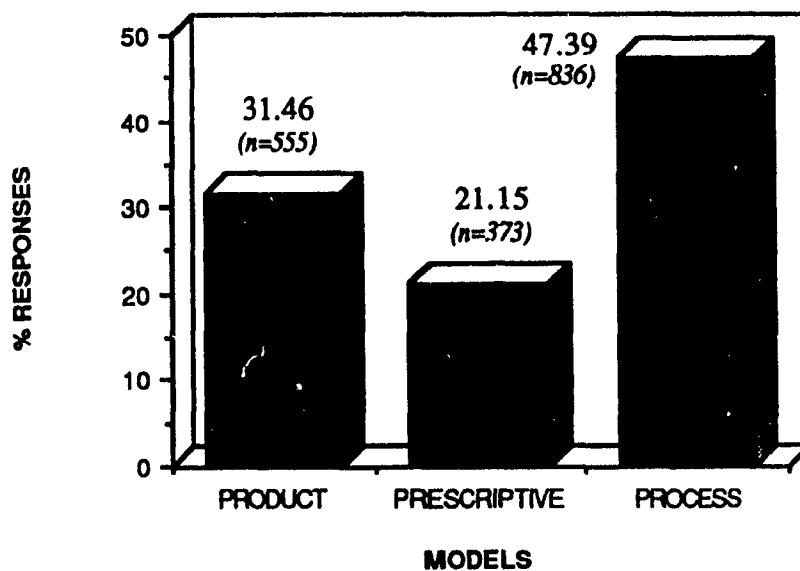


Figure 7: Percentage of responses for each consulting model collapsed over all conditions (total n=1764)

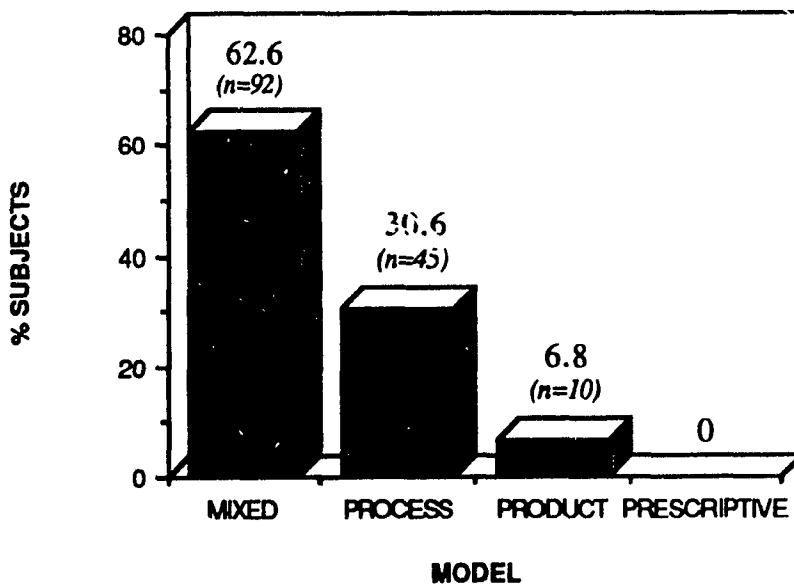


Figure 8: Percentage of subjects consistently operating within each consulting model (n=147 subjects)

Figure 9 presents the percentage of product prescriptive and process responses in each phase of the consulting process. Process responses dominate in the entry, analysis, and solution phases (50.1%, 59.6%, and 54% respectively) but drop significantly in the evaluation phase where product responses dominate (49%).

Figure 10 presents the percentage of product prescriptive and process , responses for each client experience condition (no experience, moderate experience and experienced). Once again process responses dominate in the no experience (53.9%), and moderate experience (48.8%) conditions, but falls slightly below product responses in the experienced condition (product, 41.5%; process 39.5%).

Figures 11, 12 and 13 present the results of the cross tabulations conducted to determine consulting model trends during each phase of the consulting process within each client condition. These results indicate that in the entry phase process responses dominate in both the non-experienced (fig. 11) and moderately experienced (fig.12) client conditions (57.8% and 55.8% respectively). In fact, product, prescriptive and process responses are almost identical in these two conditions. In the entry phase/experienced client condition however, product responses increase to 46.9% to account for the majority of responses and process responses drop to 36.7% (fig.13).

This same trend also appears for the analysis and solution phases. Product, prescription and process responses in the analysis/non-experienced condition parallel the responses in the analysis/moderate experience condition. In both cases process responses dominate and product responses occur in the least frequency. In the analysis/experienced client and solution/experienced conditions however, product responses make a significant increase in frequency. This is primarily at the expense of prescriptive responses since process responses still dominate in each condition.

In the evaluation phase product responses dominate in all three client conditions and are particularly pronounced in the moderately experienced client condition (60.5%).

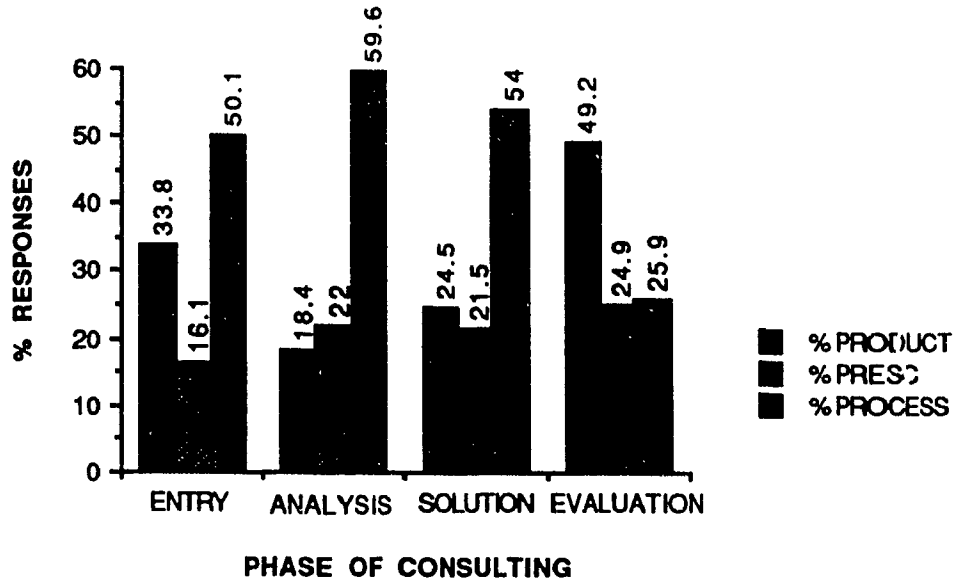


Figure 9: Percentage of consulting model responses in each consulting phase

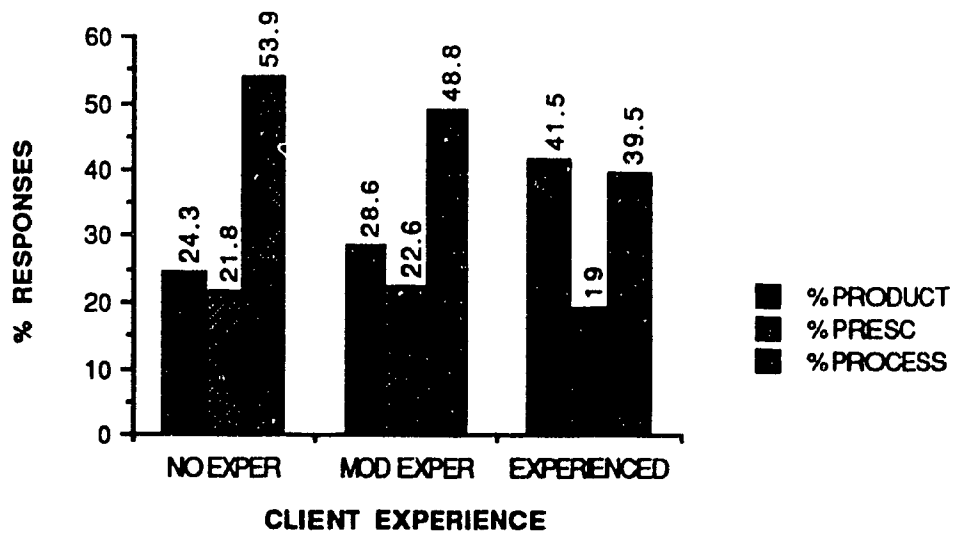


Figure 10: Percentage of consulting model responses in each client experience condition

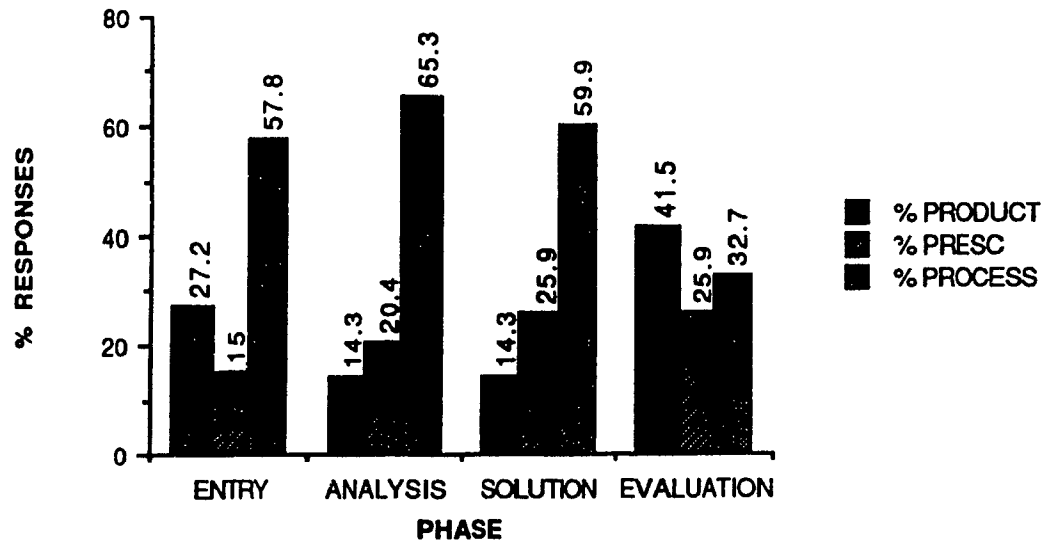


Figure 11: Consulting model responses made during each phase of consultation in the non-experienced client condition

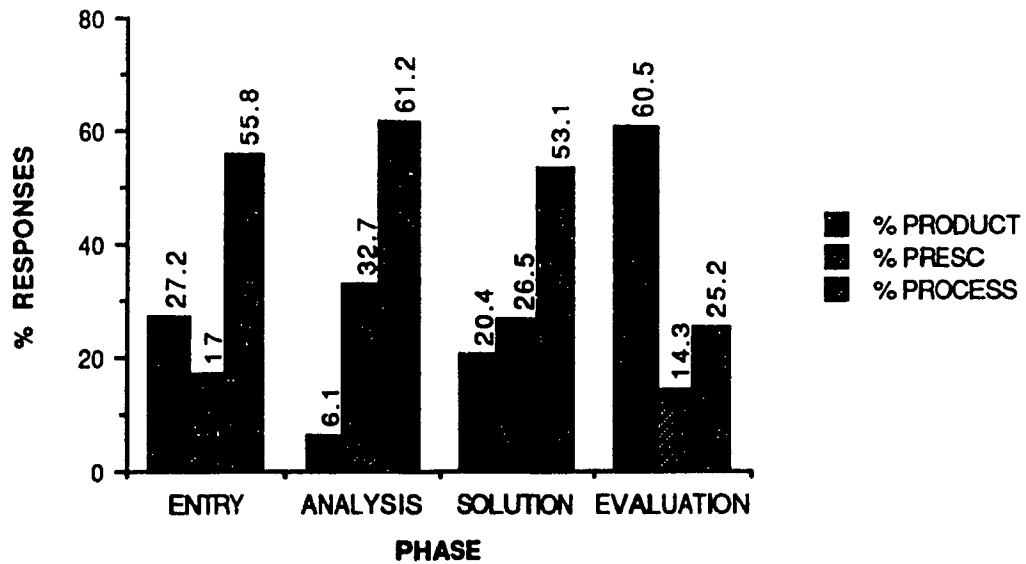


Figure 12: Consulting model responses made during each phase of consultation in the moderately experienced client condition

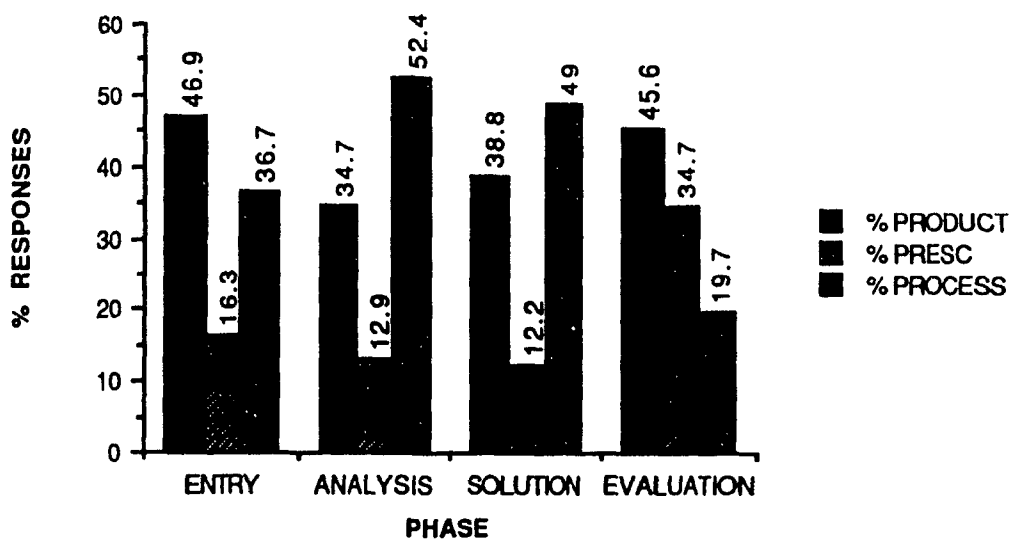


Figure 13: Consulting model responses made during each phase of consultation in the experienced client condition

Also of note is that prescriptive responses are at their highest frequency (34.7%) and process responses are at their lowest frequency (19.7%) than at any point in the study in the evaluation/experienced client condition.

Discussion of Results

Taken together, the results presented above support the following inferences about the nature of the consulting offered by the "Training Consulting Service":

1. OSDO clients are receiving primarily process oriented consultation services (figure 7).
2. Most OSDO training consultants are not operating consistently within one model of consulting but rather seem to be "model switching" depending on specific consulting circumstances (Figure 8). The remaining points describe those circumstances.
3. Clients who are perceived to be experienced in training are receiving slightly more product oriented services than either moderately experienced or non-experienced clients (figure 10).
4. Clients perceived to be experienced in training are receiving primarily product oriented consulting services during initial consultations (entry phase, figure 13).
5. Clients are receiving primarily product oriented consulting assistance in evaluation of their training programs, especially those clients perceived to have moderate training experience (figures 10, 11, 12, 13).

Each of these inferences will now be discussed in more detail.

The stated goal of the "Training Consulting Service" of Ontario's Training Strategy is the self sufficiency of clients through the transfer of training planning skills to the client (Ontario Skills Development Office Operating Guidelines, 1989). The consulting model of choice to achieve this end is the process/collaborative approach. (Block, 1981;

Bell and Nadler, 1985). The results of this study suggest that, in general, OSDO training consultants are in fact providing a significant amount of process oriented services.

When consultants are classified according to their individual consulting style however, it becomes clear that they are often switching to product or prescriptive approaches or can be said to have a "mixed" consulting style. This finding is consistent with the results of Rutt (1979,1984) who determined that instructional designers did not adhere to one particular consulting model and in fact equally favoured the product, prescriptive, collaborative/process and affiliative models. The finding is inconsistent however, with the suggestion by Hedberg (1980) that training consultants would tend to be "prescriptive" oriented by the specialist orientation of their training and professional development. In the present study "prescriptive" oriented responses were the lowest in frequency in all client scenarios. Rutt (1984) also found a very low percentage of prescriptive responses in most conditions. It would be reasonable to expect that at certain points in the consulting relationship it would be appropriate to tell the client the best course of action. Why OSDO training consultants do not do this often may be due to some feeling on the part of the consultant that it is not their professional responsibility to "tell" the client anything, or alternatively, that they do not feel professionally secure in doing so. Due to the newness of the Ontario Training Strategy many of the consultants are not highly skilled in training design issues and may feel uncomfortable giving "expert" advice.

When consultants are not providing process oriented consultation they seem to be switching primarily to product oriented consultation. This switch is determined by the phase of consultation the consultant is engaged in, by the perceived expertise of the client in training issues, and by the interaction of these two variables. Each of these will now be discussed.

In analysing the effect of consultation on consulting style Rutt (1984) found that instructional designers moved from a product model orientation to a collaborative model orientation with the client as the relationship progressed (Rutt 1984). The results of the present study were not consistent with this finding. In fact, the opposite seems to be true for OSDO Training Consultants. The data indicates that product responses increase as the relationship with the client progresses (i.e. as the consultant moves through the phases of consultation) and are at their highest in the evaluation phase where product responses dominate. There are a number of possible explanations for this:

1. Consultants are not comfortable with their skills and knowledge level in the area of evaluating training programs and therefore tend to accept client wishes more readily in this area.
2. The Training Consulting Service as designed by the Ministry of Skills Development does not place a strong emphasis on the value of evaluating the effectiveness of training delivered or the success of the consulting services they provide. It therefore becomes easier for the individual consultant to accept client wishes in regards to evaluating a training program rather than working collaboratively with the client to establish an effective methodology to determine the organizational impact and effectiveness of training that has been delivered.
3. The Training Consulting Service also requires OSDO training consultants to meet a quota of clients during the course of the year and given the situation described in 2. above , the evaluation phase may be easiest step to pay less attention to in order to allow time to meet quota requirements.
4. Many clients are traditionally resistant to thorough evaluation of training programs and might be less accepting of collaborative approaches to this stage of training development.

The most plausible explanation is most likely some combination of the above. For example, if the Ministry of Skills Development program does not emphasize or demonstrate a strong commitment to evaluating the effectiveness of training then the consultants have likely not had the requirement or opportunities to develop a strong skill base in evaluation methods and techniques. Further studies focusing on the evaluation phase of the OSDO consulting process would be required to determine if the above interpretation is in fact the case.

One factor not investigated by the Rutt (1979) study was the influence that various client dimensions might have on the choice of consultation model. He suggested that it was an important area for further research for a full understanding of client-consultant relationships. The present study clearly indicates that this is an important factor indeed, at least in terms of perceived client expertise in training planning. Clients experienced in training received much more product oriented consultation than inexperienced or moderately experienced clients. Product responses increase and process responses decrease as consultants move from non-experienced to moderate experience to experienced clients.

The most likely explanation for this is that consultants perceive more experienced clients as competent (possibly more competent than themselves) in the area of training planning and therefore defer to that expertise during the consultation process. Many training consultants are recent hires to the program and to the training profession in general and therefore may be somewhat insecure about their competence especially when confronted by a client with significant experience in the area.

The influence of client expertise becomes even clearer when its effects are examined in interaction with phase of consultation. It seems that experienced clients are receiving predominantly product oriented consultation in the "entry" phase of consultation, whereas non-experienced and moderately experienced clients continue to receive process oriented consultation in this phase. The explanation for this may again be

found in the lack of confidence on the part of the consultants to question the initial assessment of a training problem provided by a client with considerable training expertise. Also if an experienced client rebukes a consultants attempt at a more collaborative approach, the consultant may be less willing to pursue it than with less experienced clients.

Block (1981) has described consulting styles or "roles" more from the client perspective than the consultant perspective as presented in this study. He suggests that when clients consider themselves expert in a particular area they tend to seek consulting assistance in the form of an "extra pair of hands". This parallels the product approach described in this study and supports the interpretation of the findings described above. It also suggests, however, that the analysis stage would also be more product oriented with expert clients which was not the case in this study. Perhaps experienced clients, after initial consultation, are agreeing with the approaches/strategies suggested by the consultants and are more accommodating to the process approach during the subsequent analysis and solution phases.

The consulting phases by client expertise interaction also confirmed the finding, which has already been discussed, that all clients are receiving primarily product oriented assistance in the evaluation of their training programs. The interaction analysis however suggests that this is especially true with moderately experienced clients. Why this is true is unclear. It may reflect the fact that experienced clients recognize to a greater extent than less experienced clients the value of evaluating training programs (both in terms of learning and organizational impact) and may therefore be more willing to work collaboratively with consultants in this area. This interpretation is also supported by the high percentage of prescription responses found in the experienced client/evaluation condition. In general, experienced clients may have a slightly more "open ear" to the evaluation process.

In Chapter I of this study it was stated that the implicit consulting style assumed by the "Training Consulting Service" is the process model. The results of the study indicate that most consultants within the program are, in fact, providing process oriented services but are doing considerable "model switching" depending on the conditions that have been described above. This mixed usage of consulting models may not be desirable in terms of the "skills transfer" and "client self-sufficiency" goals of the Training Consulting Service but it perhaps understandable given some of the consulting realities the OSDO consultants must work within:

- clients may have no desire (at least initially) to develop internal training planning expertise and contact OSDO consultants expecting expert advice or referral to a specific training product
- clients may have conducted a thorough internal analysis of training needs and are simply looking for a training product to meet their need.
- The OSDO consultant is the first step in a path towards "incentive funding" provided by the Ministry of Skills Development to encourage training activity. Some clients consider the consulting process a hurdle to jump to get to the funding. This might even encourage clients to falsely acquiesce to process oriented consulting in order to "get to the money".
- OSDO offices have very specific client quotas they must achieve on a yearly basis. The size of these quotas can affect the quality of the consulting process. Process oriented consultation demands considerable time to be spent with the client to develop a collaborative and trusting relationship. The quotas can often "hurry" the consultant through the process or encourage them to provide easier and less time consuming product oriented consulting. This is magnified by the fact that clients of OSDO offices are generally limited to one year (see figure 4) in which time consultants are expected to help their clients develop a "training culture" through process oriented consulting.

Considering these factors and the fact that the requirement for process oriented consulting has never been fully articulated to consultants, it is surprising that OSDO consultants are able to offer the amount of process consulting that this study indicates.

For a full understanding of the nature of OSDO consulting styles, these factors and their effects on the expectations of the consultant and especially of the client would have to be investigated in more depth. The results of this study indicate that client variables may have a much stronger influence on consulting style than past studies have considered (eg. Rutt, 1979; Price, 1984).

Two promising directions for future research in the area of consultation in instructional design arise from this study. The first is further investigation into the impact that client expectations might have on consulting style of consultants. Secondly it would be interesting to determine the consulting styles used by experienced vs. inexperienced consultants. If the consultant's confidence in his or her consulting and training planning skills do influence consulting style as this discussion has suggested, then more experienced (and therefore more skilled) consultants might have the confidence in their skills and in the value of the process approach to consulting to apply this approach in a larger number of consulting situations.

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APPENDIX A

OSDO Manager Cover Letter

APPENDIX B

Subject Cover Letter

Training Consultation Style Survey

INSTRUCTIONS

On the following pages you will find three typical client situations you might encounter as an OSDO Training Consultant.

Each client situation is followed by four groups of three statements each. The statements represent three possible approaches of dealing with the client during each stage of the consulting process.

Please read each client situation and then check the statement that is most similar to what you would actually do given that client scenario. Please do this for each stage of the consulting process.

EXAMPLE: I have just won \$20,000 in a lottery. I will most likely:

Take an extended vacation

Buy a new car

Give it to charity

There are no right or wrong answers. The best answer is the one that most closely reflects the way you would actually respond in the situation presented. Don't think about it too long, just picture yourself in the situation and check the statement that summarizes what you would probably do.

Turn to the first client situation and begin.....



Client Situation #1:

Mantell Inc. is a mid-size manufacturing company producing a variety of industrial products primarily for the automotive market.

Rapid growth and pressure from the automotive industry has created the need to implement a statistical process control (SPC) system in the plant. The plant manager, Bob Scott, started to train supervisory staff in SPC methods three months ago but does not feel it is going well. The next group to be trained is the manufacturing staff who are resistant to the change.

Mr. Scott is committed to doing the training but feels that the training to date has not been implemented well. As plant manager he has some good experience planning on-the-job training but not for a project of this size. He has asked you for help in planning and implementing the training.



Go on to next page.

During the initial consultation with the client, I would:

- _____ Discuss Mr. Scott's concerns with him and, after some research, inform him of the course of action he should take to implement the SPC training as effectively as possible.
- _____ Spend time clarifying with Mr. Scott his and my ideas and expectations for an improved training implementation
- _____ Ask Mr. Scott how he would like me to help implement the required training.

In conducting the needs analysis, I would:

- _____ Search for materials and information on implementing SPC training and give them to Mr. Scott.
- _____ Help Mr. Scott isolate possible implementation problems and examine other factors that may be affecting the situation.
- _____ Examine current implementation procedures to determine where the problem areas are to help me with my final recommendations.

Assuming training is an appropriate solution, I would next:

- _____ Help Mr. Scott develop an effective training plan based on his choice from a number of possible solutions.
- _____ Write a training plan which helps Mr. Scott formalize his ideas for implementing more effective training.
- _____ Write a training plan which summarizes my recommendations for the best training implementation.

In conducting an evaluation of the training, I would:

- _____ Discuss with Mr. Scott possible ways that the training program could be evaluated and help him choose the most appropriate method.
- _____ Propose an evaluation of the training program based on information I have researched on evaluating SPC programs.
- _____ Discuss the effectiveness of the training with Mr. Scott to determine if his objectives were met.



Client Situation #2:

New Styles Ladies Wear is a small independently owned chain of five retail stores selling women's fashion clothing and sportswear.

The owner, Robert James, is concerned because his business is growing rapidly but he is experiencing a significant turnover rate of his store managers. Mr. James feels that if he could provide management training to his current sales staff and subsequently promote them to store managers, this would reduce his turnover problem significantly.

He is determined to solve this problem but has had no experience in planning training programs and is not sure what type of training is required.



Go on to next page.

During the initial consultation with this client I would:

- _____ Help Mr. James clarify the goals he has in mind for this project so we will both have a clearer understanding of what will be involved.
- _____ After listening to Mr. James' concerns on the situation, outline for him the problem as I see it.
- _____ Ask Mr. James the nature of the help he expects from me for dealing with the turnover problem.

In conducting the needs analysis, I would:

- _____ Work with Mr. James to help him analyze the situation to identify factors which may be causing the turnover problem.
- _____ Ask Mr. James to summarize the cause of the problem as he sees it.
- _____ Explain to Mr. James my analysis of the causes of the problem after collecting the required data.

Assuming training is an appropriate solution, I would next:

- _____ Develop a training plan for the management training as suggested by the client.
- _____ After mutually deciding that management training would be an appropriate solution, help Mr. James determine the best approach to plan and implement the training.
- _____ Inform Mr. James how the training would best be planned and implemented with an explanation of possible consequences, both positive and negative for not following my advice.

In conducting an evaluation of the training I would:

- _____ Inform Mr. James of the best methods for evaluating management training and proceed to do so.
- _____ Work with Mr. James to determine and implement an evaluation method discussing the advantages and disadvantages of each method.
- _____ Meet with Mr. James and ask him how he would like me to conduct the evaluation.



Client Situation #3:

Creative Play Inc. is a rapidly expanding supplier of educational toys to the day care industry. In three years they have grown from five to twenty-one employees and have moved to a larger warehouse location. In the coming year they are going to concentrate on expanding their market further through aggressive sales and marketing .

The owner, Judy Pantas, was a training and development specialist for a large company before starting Creative Play. She feels that extensive sales and marketing training is required for her staff in addition to computer operation training and leadership development. She does not know where to locate this training and has contacted you for assistance.



Go on to next page.

During the initial consultation with the client I would:

- _____ Clarify my understanding of the types of training programs Ms. Pantas would like me to find for her.
- _____ Discuss with Ms. Pantas the expectations and goals she holds for the training while informing her of my expectations and goals.
- _____ Listen carefully to Ms. Pantas's situation and then present her with a clear statement of the best course of action based on my experience with similar training situations.

In conducting the needs analysis, I would:

- _____ Work with Ms. Pantas to help her set priorities and identify the training that will most effectively help her meet her goals.
- _____ Interview each of the Crative Play employees to provide me with the information necessary for a training plan.
- _____ Describe the tasks necessary to source the type of training Ms. Pantas has identified as necessary.

Assuming training is an appropriate solution, I would next:

- _____ Draft a training plan which outlines only the training which I feel is appropriate based on my needs analysis data.
- _____ Develop a number of training alternatives that may help Ms. Pantas reach her business objectives while helping her make the final choice.
- _____ Draft a training plan for Ms. Pantas which summarizes the training Ms. Pantas requested and possible sources for the training I have identified

In conducting an evaluation of the training, I would:

- _____ Help Ms. Pantas determine how she can best use the evaluation methods you have mutually decided on.
- _____ Develop or identify questionnaires and other procedures that Ms. Pantas will need to determine if training was effective.
- _____ Provide the client with your opinions of the best methods to evaluate the training and an action plan to implement them.



STOP!

Thank you for participating in this study. Please return the questionnaire to your OSD0 manager.