MANAGEMENT TRAINING ACTIVITIES AND TRAINING

NEEDS WITHIN SELECTED BUSINESS AND

INDUSTRY ORGANIZATIONS

IN OKLAHOMA

By

DALE EDWARD KUNNEMAN

Bachelor of Science
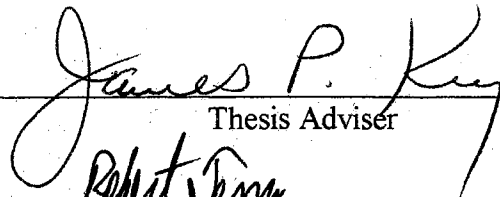Oklahoma State University
Stillwater, Oklahoma
1992

Master of Science
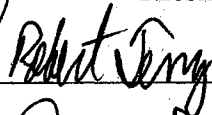Oklahoma State University
Stillwater, Oklahoma
1995

Submitted to the Faculty of the
Graduate College of the
Oklahoma State University
in partial fulfillment of the
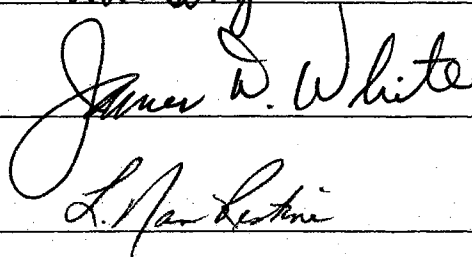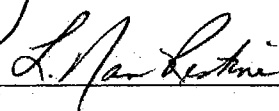requirements for the
Degree of
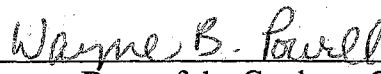DOCTOR OF PHILOSOPHY
December, 1998

MANAGEMENT TRAINING ACTIVITIES AND TRAINING

NEEDS WITHIN SELECTED BUSINESS AND

INDUSTRY ORGANIZATIONS

IN OKLAHOMA

Thesis Approved:

_____
Thesis Adviser

_____

_____

_____

_____
Dean of the Graduate College

ii

ACKNOWLEDGMENTS

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER I

INTRODUCTION

Within the realm of business and industry, the evidence of a paradigm shift is apparent. Business and industry was once an arena where the resources of land, labor, and capital, when utilized effectively, guaranteed success. This is no longer true. The Oklahoma Department of Vocational/Technical Education (ODVTE) has made an effort to focus on an element vital to the success of business and industry, the development of an organization's human resources — specifically the development of management and supervisory skills. Employers in Oklahoma business and industry organizations acknowledge the need for such skills, hence training has been developed and delivered to meet this need. However, the question must be asked, how well is the Oklahoma Department of Vocational/Technical Education doing as a provider of training and are the needs of customers being met? It is necessary to examine the training needs of these organizations and determine if the work done is focused in the direction of need. This study will provide valuable information to the organizations being surveyed, as well as the Oklahoma Department of Vocational/Technical Education. The benefit will come in the form of a greater awareness of training needs of employees and an enhanced tool to identify and meet those needs.

Background and Significance

of the Study

An examination of the general perceptions of the targeted organizations

concerning management training activities and needs will benefit the organizations

themselves and those who are interested in the efficiency, productivity and growth of

those organizations. The organizations can use the results of the study to identify common

needs and tactics to address those needs in similar organizations including source and

method of delivery. The strengths and weaknesses of current activities can also be

analyzed with the results of the study. In 1997, U.S. organizations with 100 or more

employees budgeted over $58.6 billion for training — a five percent increase over 1996

(Training Magazine, 1997). Outside expenditures comprised of seminars/conferences,

hardware, off-the-shelf materials, outside services, and custom materials accounted for

13.6 billion, 23% of the total budget. According to the study, seventy percent of U.S.

organizations will offer some training to first-line supervisors in 1998. Employers that

train supervisors will train an average of 31 individuals, that means 4.4 million supervisors

will receive some training in 1998 (Training Magazine, 1997). These estimates result in

148.3 million hours of training, based on an average of 34 hours per supervisor. As we

attempt to address this situation, an obvious place to start is to assess the management

training activities and determine training needs.

Problem

To assist in the development and selection of appropriate management training, information was needed regarding the current management training activities and training needs of selected business and industry organizations in Oklahoma.

Purpose

The purpose of this study was to examine management training needs and current training activities of selected business and industry organizations in Oklahoma.

Research Questions

The basic focus of the study was, what management training needs exist and what current training activities are taking place within the defined population? The following questions were developed to provide direction to the study:

1. How many organizations in the defined population have a training and development specialist?

2. What management training activities are taking place?

3. How much management training is offered by these organizations?

4. How are the current management training initiatives being delivered?

5. What limits training opportunities for managers?

6. How many assess their managers training needs?

7. What preferences do these organizations have concerning type, source, and methods of training?

Assumptions

The following assumptions were relevant to the conduct of this study:

1. The responses to the researcher's questions were conscientious expressions of the perceptions, attitudes, opinions, and beliefs of the Managers/CEO's.

2. The questionnaire was completed to the best of the person's ability.

Scope

The following scope applied to the study:

1. The population was limited to the business and industry organizations in Oklahoma who participated in the Training for Industry Programs (TIP) since 1968.

2. The mail out survey limited the kind of response and the raw data.

3. The results of the study may only be applicable for organizations within the population.

Definition of Terms

The following definition of terms was offered to provide clarity and consistency throughout the study:

Manager - Those who are in charge of a function(s), operation(s), or program(s), regardless of whether they have anyone reporting to them or not. This would include supervisors.

Management Training - Any formal training (workshops, seminars, programs sponsored by the company) managers receive. This excludes one-on-one or on-the-job training.

Oklahoma Department of Vocational/ Technical Education (ODVTE) - The Oklahoma Department of Vocational/Technical Education provides leadership, resources, and assures standards of excellence for a comprehensive statewide system of vocational and technical education. That system offers programs and services in 29 area vo-tech school districts operating on 54 campuses, 399 comprehensive school districts, 15 inmate training centers and two juvenile facilities. The department is governed by the State Board for Vocational and Technical Education. The department also works closely with the State Department of Education and the State Regents for Higher Education to provide a seamless educational system for Oklahoma.

Summary

The development of managerial and supervisory skills is a critical issue for human resource development practitioners. This issue is simply too important not to be addressed. The lack of management training in business and industry organizations contributes to the loss of contingent workers, decreased morale, lost profits and customers, poor work environments, decreased customer service, and a host of other ill effects. The lack of information available about management training in Oklahoma business and industry organizations complicates decision-making for the implementation

of this type of training. The purpose of this study was to examine management training needs and current training activities of selected organizations in Oklahoma to provide information for those making management training decisions.

CHAPTER II

REVIEW OF RELATED LITERATURE

Introduction

The demand from the marketplace for speed, quality, customization, timeliness, and variety of products and services has changed the landscape for doing business. The use of technology, the relentless speed of change, and the skills that working people need have changed the nature of work itself. The increasing pressure from these forces drives a constant search for better performance, from the simplest task to the most complex corporate strategy. The new reality is that the dynamic nature of individual learning and performance, particularly at the management level, turns this into a race without a finish line. To even begin the race, we must first answer the question: What do business people mean when they talk about individual learning and performance? At the broadest level, individual learning and performance refer to the ability to achieve results that keep a company ahead of the competition. It is the answer to the question: "How are we doing at the things that make us a successful business?"

Companies measure performance in terms of progress toward specific business goals such as greater market share, improved customer satisfaction, better returns to shareholders, production, throughput and so forth. To claim that individual learning and performance has improved, there must be measurable change according to the yardsticks

the company has set for itself. Performance, however, is not simply a matter of selecting meaningful results and measuring progress toward them. It is also a matter of how employees achieve those results. The most effective methods for improving performance require leveraging the employees' knowledge, skill, and behavior through all the invisible systems and processes which are the fiber of any organization.

The concepts of individual learning and performance have evolved over the last several years. Improving individual learning and performance in the workplace is a challenge that resists simple explanations. Research conducted by Hatcher and Ward (1997) demonstrates in detail that although there is an intellectual construct called high performance work, it does not have a common definition nor a universally known set of tried and true practices to apply to organizations. The most that research (Ellinger, Watkins and Barnas, 1996, Hatcher and Ward, 1997, Hirsh and Wagner, 1995) says at the moment is that many high performance work organizations have these characteristics:

- Flatter, horizontal structures
- Work done by teams organized around processes
- Highly skilled workers empowered to act
- Collaboration among teams, between labor and management, and with suppliers
- Focus on quality, customers, and continuous improvement
- Flexible technologies
- Formal change management

In short, individual learning and performance at the organizational level has proven hard to define and measure with precision, and non-financial measures have been

particularly hard to connect in a cause-and-effect relationship to strategic objectives. By contrast, much more is known about how to solve smaller-scale performance problems and enhance learning on an individual basis. Many models, techniques, and tools exist for diagnosing and improving the performance of a job, a task, or a process. Some of these were first developed more than 30 years ago and have been refined by researchers and practitioners to the point that they work reliably and consistently. Today's challenge is to focus more attention on existing tools for improving performance — to foster their use, and to prove through rigorous research which sets of practices work best. Another challenge is to develop new methods that match the reality of the changing workplace and a third is to find new measures of performance and learning that balance financial and non-financial factors.

The review of related literature for this study was compiled from a selection of literature pertaining to individual learning and individual performance, specifically in the realm of management training. The review concentrates on five areas that relate to the study. The five areas of review included: (1) Value of Management Training, (2) Determining Management Training Needs, (3) Determining Appropriate Management Training, (4) Methods of Training and (5) Sources of Training.

As the 21st century moves closer and closer, organizational leaders are becoming more aware of the competitive advantage of competent and committed people. "The value of people's judgment, creativity, and thinking has increased because the ratio of knowledge work to manual work is increasing, and continues to rise as technology takes over more and more routine and dangerous tasks" (McLagan, 1989, p.1). According to Perelman (1984), by the turn of the century, ¾ of the jobs in the U.S. will involve creating

and processing knowledge. Knowledge workers will find that continual learning is not only a prerequisite of employment but is a major form of work. "The informated and knowledge based organization is a learning institution, and one of its principle purposes is the expansion of knowledge - not knowledge for its own sake, but knowledge that comes to reside at the core of what it means to enhance performance. Learning is the new form of labor" (Zuboff, 1988, p. 349). The concepts of continual learning and the learning organization are becoming reality, and the "organizations that aspire to become learning organizations must encourage managers to adopt new roles as coaches, trainers and educators if learning it to become distributed and continuous at multiple levels within the organization" (Ellinger, Watknis, & Barnas, 1996, p. 14-2).

In a recent Executive Management Briefing in Oklahoma City, Philip Condit, CEO and Chairman of the Board, The Boeing Company, stated, "The only real constant is change" (Condit, 1997). Coping with change and preparing organizations to adjust to environmental changes is an issue faced by managers on a continual basis. Learning how to absorb knowledge, how to stay afloat in a sea of change, and how to become experts of a consistent overall strategy to deal with change are vital skills. Organizations learn how to change and adjust to become different organizations in order to respond to different environmental elements. Organizations learn how to change when they retain new skills or information (Watkins & Marsick, 1989). The importance of creating individual learning to facilitate this change is a primary reason for management training. Management education and development are not necessarily new concepts. However, they have recently become targets of criticism and key candidates for elimination in corporate training budgets. "The issue, in a nutshell, is that the rather powerful job and

task analysis tools that exist for technical and skills training do not exist for management and subject-matter training" (Swanson, 1982, p. 866). "At the same time, the direction in management training is away from general training to more specific knowledge and practice, with closer scrutiny of payoffs with respect to financial and non-financial goals" (Swanson, 1982, p. 866). As the success of a training program is determined by these performance factors, it becomes necessary to examine the value, need, appropriateness, method, and source of the management training delivered in the corporate environment.

<div align="center">Value of Management Training</div>

The question of how to determine the value of management training activities is not a new one. Training programs are offered with the intention of providing a skill or knowledge of a particular subject. This skill or knowledge is then to be applied to an on-the-job situation and thus, by having and using this skill, the managers have increased their effectiveness and ultimately the performance of the entire organization. This is certainly not always the case. The ultimate outcome of any training initiative is to create individual learning and from that learning establish a higher level of performance. But, before human resource development professionals can impart such learning and resulting performance, they must be aware of what they are after.

There are many definitions of performance and individual learning. Most describe performance as an action that produces a result that meets a business goal and learning as a process by which an activity is changed by reacting to an encountered situation. Russ-Eft, Preskill, & Sleezer (1997, p. 2) offered a definition that combines both learning and performance: "Learning, as we measure it, is a change in performance as a function of

practice. In most cases, if not in all, this change has a direction which satisfies the current

motivating conditions of the individual". Today we have shifted the emphasis from

behavior of employees to an analysis of the desired performance that should result from

on-the-job actions. We have reasoned that it is not just a behavior change that

management wants, but an improvement in the performance associated with the behavior.

Few organizations or business units set out to improve performance in the context

of the status quo. Performance improvement strategies, practices, and tools arise because

of new technology, fast growth, competitive challenge, process failures, or some other

forceful change in the way things are that causes a performance gap. Rummler and

Brache (1990) offer the figure below (See Figure 1) displaying a chain of events from

change to improved performance.

| Change | New Goals | Gaps in Performance | Performance Improvement Actions | New Behavior New Processes | Improved Performance of |

*Performance Analysis
*Case Analysis
*Interventions
*Implementations
*Change Management
*Evaluation of Measurement

*Processes
*Individuals
*Organization
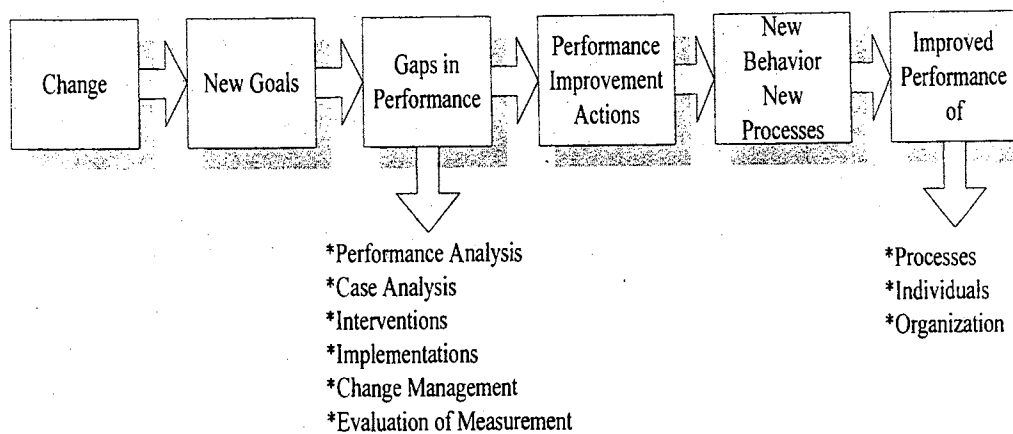
Figure 1. Chain of Events in Performance Improvement

Any approach to enhance individual learning and performance must first determine the value of a training initiative. The following must be considered: first, it is generally accepted today that the fact that people learn something in a training session does not mean they will apply the new knowledge in the organization; second, the transfer of knowledge and its retention over a long term period assumes more than a simple training activity, complementary efforts must be made to create a favorable organizational climate and prevent a relapse into old habits; third, researchers, trainers, and managers live in a world of different standards and judge training activities against varying standards, furthermore, the information they seek is not used for the same purposes (Dionne, 1996; Russ-Eft, Preskill, & Sleezer, 1997).

In many cases, the value of management training is best understood in the business world when examining the bottom line effects, short-term and long-term (Campbell, 1988; Carnevale & Schultz, 1990; Sleezer & Swanson, 1989). As the role of performance improvement in organizations increasingly takes on strategic proportions through training, quality improvement, reengineering, and performance technology, executives and training department managers are being held more accountable for dollars invested (Swanson, 1994). Organizations spend millions of dollars each year on developmental efforts aimed at management level employees. The question is then asked, how will this increase performance, quality and return more profit? Training and development is a big business, therefore its' value should be measured in the same way as other large investments, in terms of costs and return on investment (Carnevale & Schultz, 1990; Mosier, 1990). As monetary and human resources are increasingly allocated to training and development, it is

critical for organizations to evaluate training programs as other large investments are evaluated — in terms of return on investment dollars.

A primary emphasis of management training has always been to train managers to reach higher levels of performance. Today, many training professionals face the challenge of combining financial value with predicted increases in performance when making decisions. Training professionals, like other decision makers in organizations, must work up budgets, justify their own salaries, and propose strategies, projects, and programs to top management (Swanson, 1992). With a greater emphasis given to financial inputs and returns, many tools to determine the financial benefits of training have been developed. The FFB method (forecasting financial benefit) is based on several years of research and is a tool that can help practitioners overcome the difficult and necessary task of talking about training in dollars and cents (Swanson, 1992). This method is a problem-defining and problem-solving tool that can enhance the front-end analysis phase through a financial investment prospective.

Another technique aims at organizational development through the analysis of organizational performance and quality-of-work-life. The concept of quality-of-work-life has gained increased popularity by social scientists, human resource managers and organizational development professionals since the mid- to late- 70s. What exactly is quality-of-work-life? Various definitions have been offered since the term was used in the late 1960s (Sashkin & Burke, 1987). Many definitions described quality-of-work-life as a part of organizational development, others assume just the opposite. Sashkin and Burke (1987, p. 393) offer the following explanation: "Organizational Development has

developed into a widely known field of applied research and practice. Organizational development aims involve improving both organizational performance and the 'quality-of-work-life' experienced by an organization's members". Golembiewski and Sun (1990) refer to quality-of-work-life as "a dynamic process that increases the freedom of employees in the workplace by improving organizational effectiveness and the well-being of individual workers through planned interventions, with the expectations that performance, as well as, satisfaction will tend to increase in successful application" (p. 27).

The confusion sparked by the varying and sometimes conflicting definitions and views of quality-of-work-life is not counterproductive and may be healthy. This confusion is merely the byproduct of the conflict between bottom-line and humanistic values in organizational development. Regardless of the definition, the areas of human resource development and organizational development have both experienced change due to the injection of the quality-of-work-life concept.

Change has been expressed by many as a positive aspect of the workplace in the 90s. Conversely, stresses related to change continue to be identified, including job security, increased workload, technology literacy requirements and workforce morale. Employees continue to look to the organization to help address these issues. Additionally, the need to recognize the employees' value to the organization and to communicate and provide relevant support services to all employees, continues to be a primary focus to many organizations engaging in quality-of-work-life efforts. "When management, gradually in the 1980's, decided it must give workers more say about their jobs and life in the plants, many workers viewed the moves with deep distrust" (Wirth, 1992, p. 38). Employees viewed the early quality-of-work-life proposals that led to improvement, as

ploys by management to squeeze more work out of a downsized workforce.
"Management claimed American workers were lazy, sloppy, and irresponsible" (Wirth, 1992, p. 38).

The issue of quality-of-work-life, as measured by employee pay, benefits, schedule flexibility, and working conditions, finds many of it's inroads from the Japanese. Since the 1980's many leaders in both management and union environments began to see the necessity for change (Wirth, 1992). Continuing to gain notoriety is the family-friendly employer, offering plenty of options such as flextime, part-time, leave-sharing, and unpaid family and medical leave. These additions have helped employees balance their life and work responsibilities. As an increasingly diverse workforce struggles to manage child care, elder care, family emergencies, and other personal commitments, working conditions become ever more important. Recent studies suggest that an organization's ability to recruit and retain the best employees, and motivate them to enhance performance, depends on the organization's ability to create a satisfying work environment. Johnson and Johnson, for example, reported that its employees who used flextime and family leave were absent 50 percent fewer days than its regular workforce. Moreover, 71 percent of those workers using benefits said that the policies were "very important" to their decision to stay with the company, as compared to 58 percent of the employees overall (Galen, Palmer, Cuneo & Maremont, 1993).

In many organizations, quality-of-work-life initiatives do work, and they continue to work over time (Golembiewski & Sun, 1990). Robert Golembiewski and Ben-chu Sun (1990) studied 231 applications of quality-of-work-life that were conducted over twenty-two years (1965-1987). The success rates for the quality-of-work-life initiatives were

organization wide and permanent for hard-criteria effects as well as for soft changes, such as attitudes, opinions, and self-reports about worksite features.

Along with increased performance and providing an environment that promotes quality-of-work-life, planning for the future also comes into the picture. Managers and trainers must not lose sight of the long range goal of survival and growth and must "link training events and outcomes clearly and explicitly to business needs and strategic goals" (Gill, 1995, p.30). Gill (1995) continued by stating that practitioners and managers must measure the training process for the purpose of continuous improvement — performance, return on investment and the effectiveness of future leadership. The fact is though, organizations typically measure what they think is valuable. There is simply no standard for measurement. The Kirkpatrick model for training evaluation, also known as the four-level evaluation model, is acknowledged by many practitioners as the standard in the field (Holton, 1996). The three primary outcome measures are defined respectively as achieving the learning outcomes desired in the management training intervention, the change in individual performance due to the learning being applied on the job, and the organizational level results that are achieved due to the change in performance. Holton (1996) suggests that further study must be completed and that even the Kirkpatrick model needs refinement as a research tool.

Reliance on one simple tool only serves to minimize the value, impact and sophistication of management training and the results that can be achieved. "The faddish rivals of management training and development are vigorously marketed year after year. They are easy to buy and easy to install. It is just that they usually do not work" (Swanson, 1992, p. 617). If training divisions are to provide evidence that they are

contributing a valuable service of management training to organizations, it seems imperative that practitioners work deliberately to develop a more sound and reliable tool to measure the effectiveness of the services they provide.

Determining Management Training Needs

The process of analyzing needs has been described in the literature as needs assessment, needs analysis, front-end analysis, and performance analysis (Rossett, 1992; Sleezer, 1990). While the particular meanings of these terms have been debated (Moseley & Heaney 1994; Wimbiscus, 1994) each identifies a similar intent: to ascertain performance improvement opportunities or problems. Practitioners have available many models that include or detail processes for analyzing needs (e.g., Goldstein, 1986; Gupta, 1996; Sleezer, 1991; Swanson, 1994; Wimbiscus, 1994). The expectation is that the process of determining and addressing performance needs will lead to benefits such as increased performance, profit, satisfaction, and innovation.

In contrast to the many models and theories, little is known about the actual approaches taken by expert human resource development practitioners to solve performance-related problems (Lewis and Bjorkquist, 1992). Sleezer and Maile's (1997) cross-case study of needs assessment showed that human resource development professionals used diverse practices and concluded by calling for additional research and model-building aimed at practical needs assessment tools. Hatcher and Ward (1997) stated that because of the rapidity of organizational change, performance improvement professionals need innovative ways to analyze issues affecting performance. Gill (1995) indicated that performance analysis must not lose sight

of the firm's long range goal of survival and growth and must "link training events and outcomes clearly and explicitly to business needs and strategic goals" (p.30).

Although some training departments recognize the importance of business considerations and productivity outcomes, many still use intuitive methods rather than collecting and analyzing hard numbers to justify training programs (Mosier, 1990). Some training departments do attempt to use a systematic training approach to control the production of their training programs. Analysis of performance needs is the usual starting point for HRD and training processes. However, the literature reports few systematic studies that describe actual assessment practices in the workplace (Lewis & Bjorkquist, 1992; Tannenbaum & Yukl, 1992). While much is to be gained in terms of increased performance, money and time spent hastily on programs based on erroneous assumptions yield very little for the organizations and the individuals participating in them (Swanson, 1994).

The development of tools for use in determining the needs of organizations, is not a new concept. These models provide a useful framework for understanding the needs and dealing with the entire range of practical issues involved in needs analysis. Many of the models deal with the concept of a performance gap —"What training is necessary to attain the performance standard?" The dominant needs assessment paradigm is the discrepancy model, that is, "a conception of needs as gaps to be reduced or eliminated by instruction or other interventions" (Lewis & Bjorkquist, 1992, p.33). This model shows that in defining training needs one must start by identifying and comparing two levels of performance: the standard (desired, optimum, future, planned) level and the current (existing, real) level. The difference between these two levels is the performance gap.

"Beyond the discrepancy model, few alternative formulations of needs assessments appear in the literature" (Lewis & Bjorkquist, 1992, p.37). Lewis and Bjorkquist (1992, p.30) continue on by stating that "while the discrepancy model offers a general strategy, the simplification it provides ignores the complexities that real problems present." The model may provide the novice a way to think about needs assessment, but not a way to apply the skill.

In many situations, the discrepancy model is an effective tool. However, many situations demand a more focused effort to improve individual and organizational performance. "These situations establish the need for a research-based approach to the development and validation of training needs" (Sleezer, 1991, p.355). One theory base needs assessment model that has been tested in practice is the Performance Analysis for Training (PAT) model. Directed toward identifying the organization's performance needs that should be addressed with training, the model includes three components: (a) a conceptual framework with three elements that affect decisions about training needs, (b) a list of the phases and steps involved in the process of determining training needs, and (c) a set of worksheets that detail the phases, steps, and activities involved in determining training needs in an organization (Sleezer, 1991). The PAT model's premise is that the process and results of a performance analysis are influenced by the organization's characteristics, the decision maker's characteristics, and the analyst's characteristics. Training needs are perceived, negotiated, and prioritized through interaction of the decision maker, analyst, and organization characteristics.

A study conducted by Sleezer (1996) in a Mideastern U.S. manufacturer of vehicles, demonstrated the usefulness of the PAT model. The emphasis of the study was

to determine where the training should be placed to gain the greatest return on investment and what need actually existed. The analyst and the training director agreed that to be the most effective, management training must be targeted to improving the individual and organizational performance. They also agreed that the training should support the integrated manufacturing effort and address specific problems and concerns within the organization. The case study provided a test of the PAT model and examined the process used in conducting a performance analysis. The PAT model usefully guided the analysis of performance needs. In this particular situation, the performance analysis for training did not lead to an immediate training solution. Instead it led to a richer understanding of the complexities of the environment and an understanding of training's potential contribution to performance. Studies testing the PAT model in practice have targeted a financial services firm (Sleezer, 1991), a vehicle manufacturer (Sleezer, 1996), a chemical manufacturer (Sleezer, 1995), and a university school of veterinary medicine (Knorr, 1997). These studies have provided support for the PAT model's premise and identified adaptations to the model.

"The case for engaging in front-end analysis is a practical one. It is the true connection to important performance gains, not the promise of performance. Analysis reduces the amount of perceived chaos in the organization through purposeful inquiry and personal expertise" (Swanson, 1994, p. 3). There will be cases when a clear definition of performance gaps or actual needs can not be determined or of what can really be achieved by training. But ultimately, the training delivered will either improve performance or help to identify the areas where training could be an effective answer to organizational efficiency.

Before trying to diagnose or improve performance, it is necessary to understand the systems in which it takes place. Rummler and Brache (1990) note that this is similar to a physician knowing human anatomy before trying to practice medicine. The diagram below (See Figure 2) shows how the job, the process, and the organization relate to each other and to performance goals set by customers and market conditions. Although this appears to be a classic picture of systems theory, Rummler and Brache (1990) present a compelling argument that all of these factors must be linked and aligned for individual learning and successful performance to occur. A breakdown in the chain is the point at which to take action to improve performance.
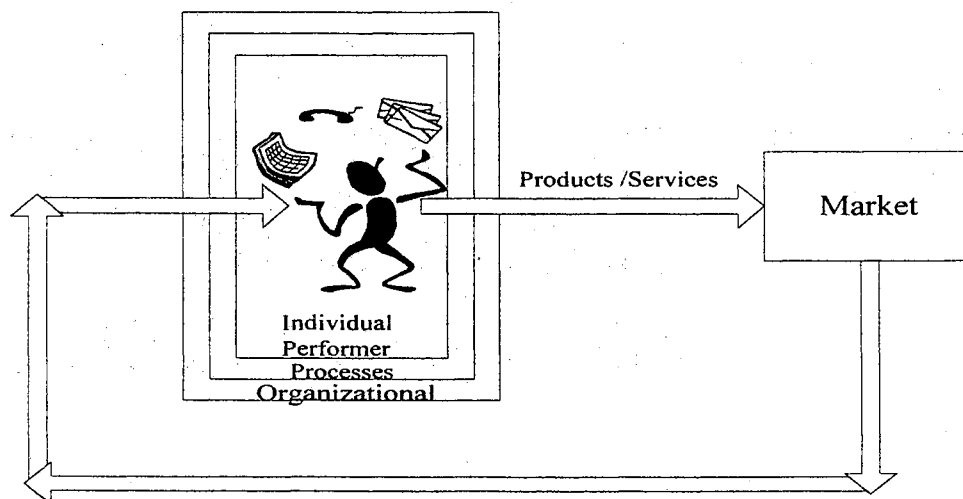
Figure 2. The Three Levels of Performance

Rummler and Brache (1990) also present a list of factors to consider when diagnosing a performance problem, whether general or specific:

- The performance required by the organization's strategy and operating plan

- The support processes that effect the required performance

- The outputs those processes must produce

- The outputs a function or department must produce

- The outputs and performance each performer must produce

- How each job or set of tasks should be performed

- The performance environment for each job

- The management processes that affect the targets for improvement

- The organization's structure

- The information each performer needs

A new traveler in the landscape of performance improvement can find direction in many models, tools, and processes that have developed over the years. Several derive from engineering and are cousins of quality improvement and process redesign methods. Most of these again involve finding and closing a performance gap by various means. These models are usually applied at the level of the individual job or work process. Other models for performance improvement address gaps in performance at the level of the entire organization, such as the PAT Model. Often these act on large-scale factors that affect performance such as leadership, innovation, employee participation, and change management. Many of these models follow a pattern of unfreezing a current state, making a transition to a new state, and refreezing in the new state. Most models, whether large- or small-scale, specify these steps:

1. Analyze Performance to Identify a Gap: Determine what, if any performance problem exists. Performance problems are typically expressed as the gap between expected performance and actual performance. Performance or gap analysis can be applied to current work or to work planned for the future.

2. Analyze the Causes of the Performance Gap: Answer the question "Why is this happening?"

3. Select and Design Actions to Close the Gap: Create the actions called interventions. Performance analysis identifies a mix of interventions that are likely to close the performance gap. Interventions may address expectations, capability, knowledge and skill, tools and technology, resources, processes, time consequences, and feedback. Interventions may meet business needs, performance needs, training needs, or work environment needs. Interventions may focus on selecting personnel, providing information needed to do a job (training, job aids, feedback); the work environment (work design, equipment, access to data); or motivation (incentives, goals, rewards). Interventions may be transformational (focusing on the external environment, organizational culture, individual or organizational performance, mission and strategy, and leadership), or transactional (focusing on management practices, systems, structure, work climate, motivation, individual needs and values, individual skills, and individual and organizational performance.)

4. Implementing the Intervention or Change: Implementing change requires among other things organizational and individual readiness, leadership support, and the work of an implementation team.

5. <u>Measure and Evaluate the Impact of the Intervention on the Performance Gap</u>:

   Evaluation tracks the impact of an intervention on organizational goals and/or specific performance gaps and goals.

Determining Appropriate Management Training

When a manager realizes that routine job experience no longer provides answers to new questions, he or she may start looking around for information, advice and training. The manager may find an answer or a useful idea, or be bitterly disappointed. "Trainers too must make compromises. They must realize that in order to achieve success they have to understand more than expressed needs. The organizational context shapes the environment in which they work; their success or failure can easily be the result of factors unrelated to the training program itself" (Dionne, 1996, p.283). The appropriateness of the training provided to managers must be based on an understanding of support systems and organizational needs — many times transparent. Every organization must come to better clarify the management training activities and realize that the success of training programs cannot be evaluated on an activity-by-activity basis. "Training is like an antibiotic: it takes a large enough dose over a long enough period of time to produce positive results" (Dionne, 1996, p.284).

The literature of recent years has enthusiastically promoted the tying of management training to strategic business planning. The proposal is certainly convincing. "Strategically-linked training may be essential to the success of contemporary firms challenged by increasing global competition, accelerating technological change, and shifting workforce demographics. In fact, several leading organizations, including

Motorola, General Electric, and Hewlett-Packard, credit recent business success to appropriately positioned training" (Catalanello & Redding, 1989, p.51). But the question must be asked, what does it mean to link training to strategic business planning? Catalenello and Redding (1989) identified three distinct strategic roles for the training function: (1) to equip managers with skills to think strategically, plan strategically, and to understand key strategic issues; (2) to allow training departments to participate in the formulation of strategic plans; and (3) to identify and implement training programs that directly support strategic plans. The emphasis is on the ability of managers to use conceptual, cognitive, and interpersonal abilities to guide the organization. They must have the capabilities to make the best choice among available strategic alternatives or destine their organizations to be stuck in the proverbial rut, trapped in organizational paralysis (Catalanello & Redding, 1989). This places training professionals in a role of providing sophisticated skills of organizational understanding to the managers they support and conveying the understanding that a work force educated simply by 'old school basics' will not be equipped for meeting the challenges of turbulent change (Wirth, 1992). A specific case presented by Wirth (1992) described an appropriate example.

In the past, workers joining the Proctor & Gamble organization found themselves entering into narrowly defined jobs consisting of low-skilled tasks that changed little if any during a person's working career. Now, the organization has initiated a strong trend toward participative work systems. Employees now perform a broad range of tasks that include the operation and maintenance of equipment and ensuring that quality is maintained. The employees participate in goal setting and budgeting, formally reserved strictly for management. Self-directed work teams participate in problem solving sessions

and decision making processes. The key to all of these efforts is that the company has committed to providing training and retraining in the technical and specifically, the interpersonal skills area, to meet the demands of the dynamic environment. Training of production employees in the areas of interpersonal skills is only effective if the management possesses those same skills and behave in line with those skills. With this as Proctor and Gamble's conception of new work, they have issued a call for "nothing less than a revolution in the role of the teacher (trainer) and the management of school (worker education)" (Wirth, 1992, p. 73).

Within the realm of business and industry, it is generally accepted that management training is important. Understanding that an all inclusive approach to management training is inappropriate, is as vital as the fact that management training is needed. Management training and development are defined as a set of activities where by practitioners - managers or would-be managers - are assisted in improving their individual competence and performance as well as the organizational environment, with the ultimate goal of raising the standards of organizational performance. With a jigsaw puzzle, one can not dispute that there is only one right solution, and each piece has only one right place. However, in business organizations and management training, there are usually many alternatives and competing solutions. "Sometimes, the solution is not clear even after several have been attempted with varying degrees of success" (Mariotti, 1997, p.29). However, there is an advantage to jigsaw puzzles that management training lacks, the picture on the box matches the puzzle and will not change after you have completed a portion of the puzzle. That is not the case in management training and business. In business and training, the road to success is always under construction.

Methods of Training

Instruction is a cornerstone of the HRD and training function (Watkins & Marsick, 1995). "In many senses, trainers have a task no different from classroom teachers, or college professors. They must teach subject mater knowledge, processes and procedures, while striving to enhance the knowledge, skills and attitude of their trainees" (Lewis, 1996, p. 23-4). In many cases the individuals enlisted as trainers do not even possess a minimum of professional preparation to enter into the field. Training is a difficult profession, and a training method that may have worked in one situation may not always work as expected the next time. The instructional methods used in a training situation can easily determine the success or failure of the program (Lewis, 1996).

Methods used in training situations can be used not only for training itself but as a tool for identification of management training and development needs. When training is conducted, the characteristics of the management skills, knowledge, attitudes and shortcomings can be used to select and apply the most effective methods of training. Within the arena of management training their are three generally accepted approaches to learning: behaviorism, pragmatism, and cognitivism (Huberty & Kramlinger, 1990).

The behaviorist approach relies on the premise that learning occurs primarily through reinforcing desired responses. The intention of the behaviorist approach is to reward the desired behavior to a point that the actual behavior becomes the reward. A well-known member of the behaviorist camp, Robert Gagne wrote an article titled "Military Training and Principles of Learning" (1962). In his article, Gagne examined the assumptions and traditional principles of learning as they applied to training for three

representative tasks (one required learning a motor skill, one required learning a fixed procedure, and one required learning troubleshooting skills). In his conclusion he reported that focusing on what was to be learned was more important than using the differentiation of task elements, and familiarity. The presentation of three psychological principles completed his explanation: (a) identify the component tasks of a desired performance, (b) ensure that each component task is fully mastered, and (c) sequence the learning situation to assure optimal mediation from one component to another (Sleezer & Kunneman, 1997). The use of behavioral simulations and management training simulations in management education have become popular instructional methods (Hough, 1996). In forty years since the first business game was created (Lane, 1995), simulations and game situations have become widely used as instructional methods.

When addressing the pragmatist approach, the theory is that learning occurs primarily through the reflection of personal experiences. The trainer extracts the lessons from the individual's own insight and experiences leading the learner to make new connections. Dewey's desire to make live connections between the past, present, and future reflects the pragmatist approach to learning. The portrayal of academic history as what has already happened to others removed from the possibility of even provisional understanding seems to be as dead a pedagogical ploy to Dewey as it does to many industrial training situations (Dewey, 1909; 1959). The point then is that Dewey was more interested in defending active participatory inquiry and experience over any reality check about the ins and outs of skill and knowledge acquisition. Dewey argues that "the only way to prepare for social life is to engage in social life" (Dewey, 1959, p. 14). He continues by explaining that teaching habits of social usefulness and stewardship apart

from any direct social need, motive, or existing social situation , is, to the letter, teaching the individual to swim by going through motions outside the water (Dewey, 1909, 1959).

The cognitivist approach is academic in nature, relying on the principle that learning occurs primarily through exposure to logically presented information. The narrow focus dominating much of the literature on training, can to a large extent be explained by the dominance of the behaviorist school and its way of equating learning with behavioral change. The interest in how cognitive skills are acquired and performed was a predicted and rapidly growing phenomenon, escalated by increasing use of computers and changing modes of production (Gilbert, 1978; Hirsh & Wagner, 1995). Cognitive development occurs when concepts, values, and thoughts are internalized and practiced in interaction with others. Contextualizing learning and understanding that different environments require different levels of adaptability and different forms of mental activity, is at the core of the cognitivists approach to learning.

Huberty and Kramlinger (1990, p.43) presented the application of each approach stating that "simpler tasks are appropriately learned by behaviorists techniques, while higher-level tasks often require more cognitive input and pragmanistic insight." So, which method is the most appropriate for management training? Huberty and Kramlinger (1990) argue that the most appropriate method for creating peak performance is the behaviorist approach because its strength lies in building an immediately useful repertoire of specific business behaviors. However, the cognitivist's approach provides the information and rationale perspective that the learner needs to understand the level of performance expected. But, to fully achieve peak performance requires the pragmatistic methods — the stimulation of the learner's initiative, creativity, and independent thinking must occur.

So, just which method is the most appropriate for management training? Catalanello and

Redding (1989, p.51) state that "managers must have the capabilities to make the best

choice among available strategic alternatives or destine their organizations to be stuck in

the proverbial rut." Furthermore, they charged training professional with the role of

providing sophisticated skills such as strategic thinking and organizational understanding

to managers. This would lead the reader to believe that all approaches must be

incorporated in order to equip managers with the skills necessary to strategically lead

organizations.

Russ-Eft, Preskill, and Sleezer (1997, p. 304) argue that cognition and behavior

are "so tightly intertwined, that it is counter-productive to define learning as change in

either one or the other". They contend rather that learning should not be described as a

particular change in the state of cognition or behavior, different learning situations will

determine the cognitive or behavioral change. This is demonstrated in the below figure

(See Figure 3). The diagram introduces the learning with reference to individual learning.
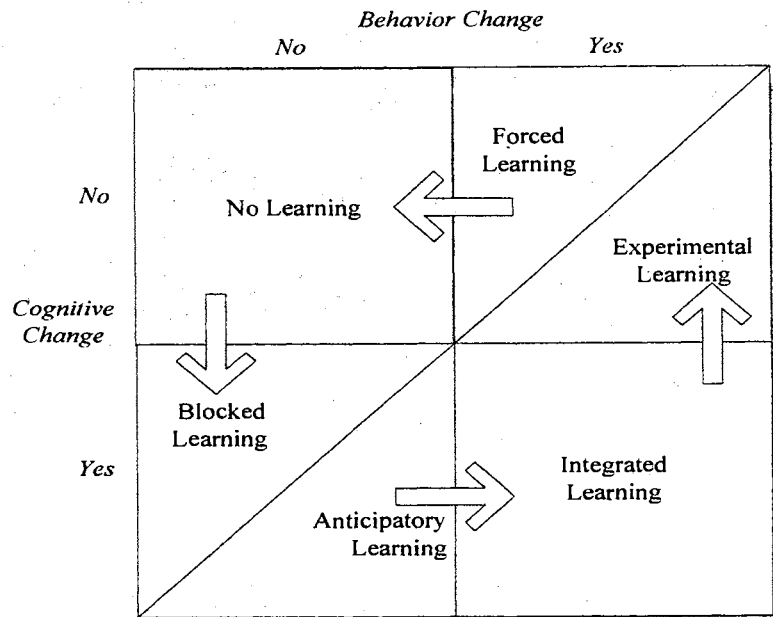
Figure 3. The Relationship Between Cognition and Behavior

Russ-Eft, Preskill, and Sleezer (1997) do admit that there is certainly no learning in the absence of behavioral or cognitive change. However, when both are present, the outcome is integrated learning. The primary concern brought forward by Russ-Eft, Preskill, and Sleezer (1997, p. 304) is the change in behavior without a corresponding change in cognition, or change in cognition without a corresponding change in behavior, are transactional states that create tension between one's beliefs and one's actions. The result is obviously a dramatic decrease in the effective of any effort to enhance individual learning or performance.

Understanding the importance of how the training is delivered is as important as the individual's want or desire to learn (Dixon, 1991). "For the last century and a half, or so, educators and psychologists have tried to develop ways to deliver instruction, practice and experience that enhance this innate capacity to learn" (Zemke & Zemke, 1995, p.31). Zemke and Zemke (1995) presented a study concerning the motivation to learn and conditions necessary for learning to take place. The primary emphasis was the individual's motivation to learn — adult learning is problem centered. As managers face continuing and ongoing change within today's organizations, any learning that promises to help them through the transition provides a valuable learning experience.

Adults are contemporary-based learners, meaning that they want to learn and acquire knowledge and skills that they can apply pragmatically to their immediate circumstances (Jacobs & Jones, 1995: Rummler & Bache, 1990; Sibler & Stelnicki, 1987). Though immediate utility is most often the primary motivate, it is not the only motivation. Expanding the individuals current knowledge and skill level is also a driving force. Personal growth and gain can serve as a strong incentive for adult learners to seek and

participate in learning activities. "Human learning is one of the most complex subjects of the scientific and scholarly world. While it is easy to demonstrate how little we now about the human mind, it is important to acknowledge the sheer volume of research and common sense available to us in better understanding the learning phenomena" (Swanson & Law, 1993, p.43). Most management training is an attempt to alter the personal and internal systems managers operate by. "Training is pathological when stress is laid upon correcting wrong-doing instead of upon forming habits of positive service" (Dewey, 1909, 1959, p. 15). Understanding the motivation and the methods that appeal to adult learners, specifically management personnel, is a vital element to the success of any training program.

Sources of Training

Many businesses have accepted the importance of management training and are therefore calling on suppliers of this type of training in order to gain the levels of productivity desired. Those organizations who have identified a need or have a desire to equip their managers with the skills necessary to guide them into the 21st century, have become quite resourceful. "Legions of gainfully employed managers continue to enroll in education programs at community colleges, vocational-technical centers and universities around the world, not to mention the success of proprietary self-development seminars, skill camps, independent study groups in virtually every industrial and postindustrial country" (Zemke & Zemke, 1995, p. 32).

The primary focus of this study dealt with the effectiveness of the Oklahoma Vocational Technical System as a supplier of management training to the organizations in

Oklahoma. In Oklahoma, training for new and expanding industry is provided through the Training for Industry Program, commonly known as TIP. TIP is administered by the Business and Industry Training Services (BITS) Division of the Oklahoma Department of Vocational and Technical Education (ODVTE). It is delivered through a statewide network of 29 area vocational/technical schools with 54 campuses equipped at an investment of more than $50 million. TIP is committed to providing companies with the skilled employees necessary to compete in today's global market and to maintain that competitive advantage for years to come.

When a company decides to locate in Oklahoma, the ODVTE immediately begins working with them to design their customized training program. Representatives from the participating company and the ODVTE will meet to assess the competencies needed in each job category and to design the training program accordingly. The ODVTE then develops a statement of understanding that outlines responsibilities, areas and length of training, number of employees to be trained, and any special requirements. There are no applications to complete or reviews by committees — just quality training delivered to the company and their new Oklahoma employees when and where they need it!

Costs typically covered by the Oklahoma Vocational/Technical system in a training project for new or relocating companies are: instructors used in customized training , materials used in the training process, curriculum developed and/or used in training, supplies needed for training, and training facilities at the area vocational/technical school or other site if needed.

Examples of Companies Served by TIP are: Goodyear Corporation, Fort Howard Corporation, Kimberly-Clark Corporation, Seagate Technology, Hilti, Fo-Mac, Inc.,

Central and South West Services, Bama Foods, Whirlpool Corporation, Southwest

Airlines, Waterloo Industries, and Seaboard Farms. Sam Gibara, president and chief

executive officer of Goodyear Corporation, while addressing the second regular session of

the forty-fifth Oklahoma Legislature stated: "You . . . and all Oklahomans . . . have a

tremendous advantage in your outstanding vocational-technical education program. The

state's vo-tech campuses, and the high level of training they offer, position Oklahoma a

distinct step ahead in the global competition for jobs. The training partnership established

between a company and the Oklahoma Vocational/Technical system during their start-up

phase can continue to function long after they begin operation." According to Clay

Lynch, manager of training and development at Seagate Technology, this partnership

yields success. "The vo-tech/industry training concept," explained Lynch, "is the most

effective and efficient method for maintaining a skilled workforce in today's high-tech,

competitive business world." Through this training partnership, Oklahoma Vo-Tech will

provide the support companies need to remain competitive in a constantly changing

economic climate. "The vo-tech training we have utilized over the years has contributed

to our success in a big way," said Willie Dale Robertson, training director, Fort Howard

Corporation. "Without this help, we could be scaling down with layoffs or shutting plants

down as our competitors are." Hilti, an international manufacturer and direct marketer of

construction fastener products, established a new division in 1991, hiring more than 70

customer service representatives. "No off-the-shelf training package met our

requirements," said Dan Taylor, Hilti's director of customer service. "Vo-Tech helped us

design a customized program. They're very responsive. They do what they say they're

going to do when they say they're going to do it," says Taylor. "Their speed and flexibility

are impressive. We changed directions in midstream, and they were able to redirect their efforts."

Since its creation in 1968, Oklahoma's Training for Industry Program has earned an international reputation by providing more than 600 companies with a trained, start-up workforce. The program has built its' reputation on a commitment to deliver quality training. It has helped workers develop the skills necessary to perform at their highest level. Through TIP, training is customized to meet the companies specific needs. The organizations employees are trained in the processes and on the equipment used by their company. Programs range from basic skills, through Total Quality Management and ISO 9000, to the latest in organizational design and management training. In short, TIP has provided the training necessary to guarantee that the Oklahoma workforce meets the start-up requirements of new and expanding industry.

Oklahoma's TIP provides companies with a workforce that is productive on the first day of operation. The program assists the Oklahoma Employment Security Commission with the recruitment of potential employees as well as the design and delivery of customized employee training programs. With TIP training, companies experience increased profitability from enhanced employee productivity. Oklahoma companies that have taken advantage of TIP training have benefitted from lower turnover, decreased absenteeism, and reduced downtime.

A study conducted by Mary Jo Elenburg (1986) identified four primary sources of management training to mid-sized organizations (50 - 1,000 employees) in Oklahoma. Those sources included: Area Vocational-Technical Schools, Universities and Community Colleges, In-House Training Departments, and Private Firms. She concluded that the

organizations participating in the study preferred Private Firms as the number one source of management/leadership training. The second choice for this type of training was universities and community colleges followed by In-House Training Departments. Area Vocational-Technical Schools were consistently chosen forth or fifth.

A similar study conducted by Dale Kunneman (1995) also identified four sources of management training to organizations within the eight Chief Executive Officer (CEO) Network organizations served by Meridian Technology Center. The sources included: Area Vocational-Technical Schools, Universities and Community Colleges, In-House Training Departments, and Private Firms. The study concluded that the participating organizations preferred In-House Training Departments as the number one source of management/leadership training. The second choice for this type of training was universities and community colleges followed by Area Vocational-Technical Schools. Private Firms were consistently chosen forth.

Business and industry have typically performed their own training, but due to higher production and efficiency demands and increasingly competitive markets, they have chosen to call on external experts for training programs. Many external training programs are provided by commercial firms or professional societies that specialize in the training function. External training programs can be conducted at a pre-selected training site or at the industry's work location. This adds to the attraction of outside sources of training to business and industry. The decision to use outside training sources is usually based on business needs. The quality of the source of training is as important to organizational success as the appropriateness of the material presented. As each of these suppliers

position themselves as potential sources for management/leadership development, the critical element is a close link to the specific needs of the organizations they serve.

Summary

The business need to enhance individual learning and performance is an opportunity for training and development practitioners. The extent to which they can operate in the performance improvement arena depends on their own competencies and the disposition toward performance in the organizations they serve. In some companies, training is not connected to performance outcomes: it is a process for delivering knowledge, skill, and information. In other cases, training is performance-based by intention but not necessarily part of a performance improvement strategy that considers many kinds of interventions. In companies that are focused on individual learning and performance, training is one of many possible interventions that might be used to close a performance gap.

Much of the research and theory about high performance work is based on Industrial Age companies. The shift to information- and knowledge-based work is likely to change thinking about work performance, according to Davis & Botkins (1995). Davis & Botkins (1995) challenge many of the basic assumptions of performance improvement. Because change happens faster than adaptation, closing gaps is futile, they assert. Their proposition is that it is better to prevent gaps from developing. They question the notion of focusing too much attention on the organization: it should be no more than a means to an end rather than an end in itself. By their reasoning, the best performing companies would have the least organization.

Measurement of individual learning and performance is also likely to change as non-financial measures make their way onto balance sheets and evidence grows that actions which increase shareholder value, such as stock splits or mergers, don't improve. The balanced scorecard concept, developed by Robert Kaplan and David Norton (1995), gives a picture of company performance that is balanced between financial measures and operational measures such as customer satisfaction, ability to innovate, and so on. Accountants too are searching for non-financial measures of performance. The diagram below (See Figure 4) shows an example of a balanced set of performance measures.
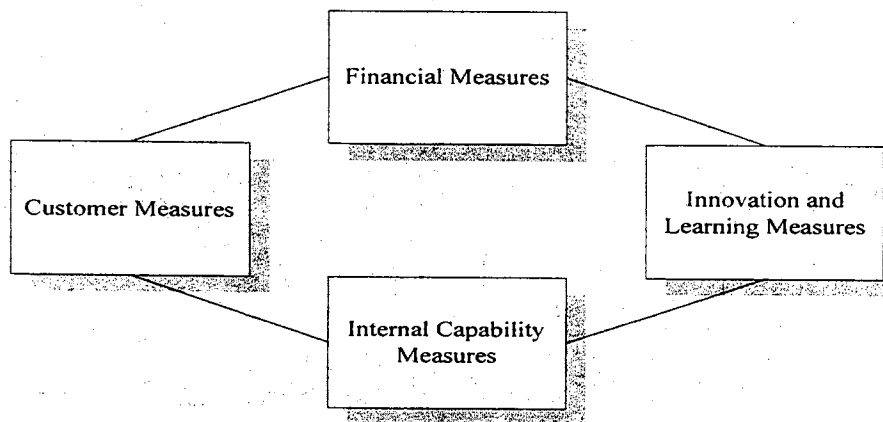
Figure 4. An Example of Balanced Performance Measures

Kaplan & Norton (1995) argue that besides seeking balanced measures of performance, managers are also looking for better ways to connect the systems and processes of an organization to its measures of human performance. The question still remains: how do individual learning and performance measures relate to overall goals? For most organizations, individual learning and performance equals people -- what they know and how quickly the organization's systems and processes can apply that intellectual capital to reaching strategic goals. Performance and individual learning in this sense is a state of mind, a perspective that starts with results and works through many possible ways to achieve them. Most learning and performance improvement efforts are part of larger systems for achieving specific business goals. Sometimes these efforts reshape the organization and alter key work processes. Often they require the efforts of many players who may not have worked together before: people who know the business, people who understand technology, people with analytical and systems skills, and people who know how to design and deliver learning — especially contextualized and just-in-time learning. When a company pursues individual learning and high performance, the mindset, the vocabulary, and the practices of training professionals frequently change. In such companies, it is not enough to seek improvement through isolated training events or behavior change.

The table below (See Figure 5) illustrates some major differences between a training perspective and a performance perspective (Hatcher and Ward, 1997; Rummler and Brache, 1990; Russ-Eft, Preskill, and Sleezer, 1997).

TRAINING PERSPECTIVE	PERFORMANCE PERSPECTIVE
Assumptions Training (giving employees more skill, knowledge, or ability) is the solution to performance problems.	**Assumptions** Training is one possible intervention when there are performance problems.
The goal of training is to give employees more skill, knowledge, or ability.	**The goal** of performance is to meet organizational performance goals.
A **training department** should deliver the training that customers ask for.	A **performance improvement department** should question whether training is needed.
A trainer's **most important skill** is to deliver training and facilitate learning.	A performance improver's **most important skill** is to diagnose performance problems.
Roles Training needs analysis Training design Training delivery Evaluation Training management and coordination	**Roles** Performance analysis/diagnosis Cause analysis Intervention Change implementation Evaluation and feedback Project management
Measures Reaction of participants Capability after training Transfer of learning to job Return on investment	**Measures** Effect on performance gap Achievement of business goal
Tools Assessment instruments Instructional design models Group process The classroom Learning technology Textbooks, workbooks, tests	**Tools** Organization's operating plan Strategy statement Process map Templates, models, matrices for human performance management Performance support technology
Customers The learner The learner's manager The training purchaser	**Customers** The process owner The performer The performer's manager The company's customers

Figure 5. Major Differences Between A Training Perspective and a Performance Perspective

To be a player in the high-stakes world of individual learning and high performance requires a perspective that focuses not on how much training is delivered but on how fast people gain more capability to improve performance and how much of that capability the organization is able to use for strategic purposes. It is a perspective that measures success in terms of output, not in terms of how much skill or knowledge employees are exposed to. It is a perspective that might even rule out training as a way to reach a performance goal.

CHAPTER III

METHODOLOGY

The primary purpose of this study was to examine management training needs, current training activities, and the perceptions of selected business and industry organizations in Oklahoma. The results of the study will be useful to decisions makers in the organizations involved who want to know current training activities taking place in similar organizations, the perceptions of those activities and the needs within their own and similar businesses and industries.

In particular, the Oklahoma Department of Vocational/ Technical Education has a special interest due to the origination of the population and the fact that the information will assist them in providing appropriate and quality management development services to business and industry.

The questionnaire was derived from the objectives of the study listed in Chapter I. Survey instruments were administered by mail and in person. This chapter was comprised of four segments: (1) identification of the population; (2) instrument design and development; (3) institutional review board approval; and (4) data collection and analysis.

Identification of the Population

A validated list of business and industries in Oklahoma was not available to initiate

this study. The absence of this list resulted in a significant portion of the project dedicated

to development of the population list. The list of business and industry organizations in

Oklahoma was compiled by using a list provided by the Oklahoma Department of

Vocational/Technical Education. The list was developed from participating organizations

in the (TIP) Training for Industry Program. Furthermore, the list was validated by the

State Coordinator of TIP and Technical Training Specialists responsible for maintaining

the established TIP contracts and Industrial Coordinators at the area vocational/ technical

schools who worked with the identified companies. The lists contained specific

information on a total of 427 organizations. The database was organized according to

participation in the (TIP) Training for Industry Program.

Instrument Design and Development

After reviewing several studies which are similar in nature, an instrument suitable

for the purpose of conducting this study was developed. The instrument was derived from

a study titled, *A Survey of Management Training Activities in Mid-Sized Organizations in*

Oklahoma. The researcher gained written permission to modify and use the appropriate

sections of Elenburg's instrument. The author of the original instrument, Mary Jo

Elenburg, developed a series of questions adapted from a literature review and submitted

the questions for critique to 28 professionals and representatives of the population to be

studied. The reviewers were identified by Elenburg through the American Society for

Training and Development and the training and development activities in which she participated.

The questionnaire was further refined by Elenburg and a team of seven subject matter experts in management training, research, and statistics. Further information concerning this team can be found in the source of this questionnaire. The subject matter experts compared Elenburg's questionnaire to the propose of the study and research questions. They attested to the content-validity of the questionnaire. The initial questionnaire consisted of 23 items. The questions were forced-response items with specific statements for response by participants. Elenburg's questionnaire was mailed state-wide to 1500 organizations as defined by Elenburg's population. The survey received further modification in 1995 as it was utilized in a study conducted by Dale Kunneman (1995) titled, *A Study of Business and Industry's Current Management Training Activities and Training Needs within Meridian Technology Center's CEO Network.*

The questionnaire was designed with the following considerations:

1. Organizations that are large enough to have managers other than the owner but too small to support a part-time or full-time training specialist have similarities in management training needs.

2. Most managers in mid-sized organizations have preferences for the type and source of management training.

3. Organizations with more than 1000 employees have a greater need for a training specialist. Their management structure would most likely be indicative of a large organization.

4. Organizations with fewer than 50 employees have an owner/manager who is the policy/decision maker. Management training would not affect those organizations as it does an organization that has more than one person affecting policies/decisions.

The final revisions to the questionnaire were completed by the researcher's dissertation advisor, a representative from the research division and the business and industry division of the Oklahoma Department of Vocational/Technical Education, and a team of six plant managers/ CEO's with extensive experience in human resource development, statistics, and research. The critiques compared the researcher's questionnaire to the propose of the study and research questions. They attested to the content-validity of the questionnaire.

The final questionnaire consisted of 22 items in booklet format. The questions required specific responses by participants. The final revision of the questionnaire consisted of three basic parts or sections (Appendix A) . The main body of the questionnaire consisted of 22 survey questions. The first section consisted of demographic information from each participant in the survey. The second section consisted of questions to establish the local level of participation in management training programs. The third section consisted of questions concerning the present and anticipated future utilization of management training. The questionnaire was condensed into a four page booklet form in order to appear less cumbersome and complex. The questionnaire was designed to answer the research questions:

Survey Questions	Answered Research Question
#5 and #6	#1
#22	#2
#4 and #8-11	#3
#7	#4
#16	#5
#12-15 and #21	#6
#17-19 and #20	#7

Non-response is a common problem encountered by researchers using mailed questionnaires. Many factors determine the success of response. The researcher anticipated this problem and used suggestions of methods by Dillman (1991) to address non-response items. Methods used to encourage participant response were the design of the questionnaire for speed and ease of completion, the cover letter, and recognition through the Oklahoma Department of Vocational/Technical Education and Oklahoma State University as the source of the research.

Institutional Review Board (IRB) Approval

Through the revision process, the final instrument was submitted to the Institutional Review Board. Federal regulations and Oklahoma State University policy require review and approval of all studies that involve human subjects before investigators begin their research. The Oklahoma State University Research Services and the IRB conduct this review to protect the rights and welfare of human subjects involved with the

aforementioned policy, this study received the proper surveillance, was granted permission to continue, and was assigned the following number: AG-98 -028-A.

Data Collection and Analysis

In accordance with federal regulations and the Oklahoma State University policy, an instrument was developed that met the requirements of understandability and continuity of questions. Organizations within Oklahoma who participated in the Training for Industry Programs (TIP) determined the population of this study. Questionnaires were sent to the selected organizations and inconspicuously coded so that a follow-up mailing could be conducted.

The first mailing of the questionnaire resulted in 276 (55.20 percent of 427 mailed) usable responses. Of the 427 questionnaires mailed, 25 (5.10 percent) were returned undeliverable. The researcher determined a second mailing was needed to increase the rate of return.

A second mailing to the 126 non-respondents from the first mailing was completed six weeks later. The second mailing resulted in 117 (23.40 percent of total mailing) usable responses. In the second mailing, 9 (1.70 percent) were returned undeliverable. Of the original 427 questionnaires delivered, 393 useable questionnaires were returned. The researcher accounted for 100 percent of the organizations on the original list of 427 through either a response or an undelivered return.

Data from the questionnaires were analyzed using descriptive statistics, frequency distributions, percentages, mean scores, and cross tabulations. Data suited for cross tabulation by organization size and type were determined. Each specific question was

analyzed based on the number of responses to that particular question since all respondents did not respond to all questions. In addition, the data from the rank-order type of questions was computed to provide weighted means for each item.

Summary

This chapter described the methods used in the study, identification of the population, instrument design and development, institutional review board approval, and data collection and analysis. Since an existing instrument suitable for this study was not available, the researcher developed an instrument, established content validity via a panel of experts, and made the decision to proceed with the study.

The initial instrument (Elenburg, 1986) was pilot-tested with ten business and industry organizations, allowing 28 professionals and representatives of the population studied to review it. Additionally, a modified version of Elenburg's instrument was used in Kunneman's (1995) study, resulting in a 81 percent response rate (124 returned from 141 questionnaires mailed, 10 returned duplicated or with insufficient information).

The researcher mailed 427 questionnaires followed by a second mailing (126) six weeks later. Data from the questionnaires were analyzed using descriptive statistics. Frequency distributions, mean scores, percentages and cross tabulations between questions were used to interpret the data. In addition, data from the rank-order type of questions were computed to provide weighted means for each item.

CHAPTER IV

PRESENTATION AND ANALYSIS

OF THE DATA

The results of the study are divided into seven sections. The seven sections are the seven research questions for the study: (1) How many organizations in the defined population have a training and development specialist? (2) What management training activities are taking place? (3) How much management training is being offered by these organizations? (4) How are current management training initiatives being delivered? (5) What limits training opportunities for managers? (6) How many assess their managers training needs? (7) What preferences do these organizations have concerning type, source, and methods of training?

Of the 427 questionnaires mailed, 393 were returned. Out of the 427, 34 were returned undeliverable. A total of 393 (92.04 percent) completed and returned questionnaires were used to represent the defined population. The analysis is based on those 393 responses. To completely and accurately present the data, various tables were formulated.

Of those reporting, 7.09 percent indicated they were from organizations of less then 50 employees, 11.81 percent indicated they were from organizations of 50 - 99 employees, 29.17 percent from organizations of 100 - 249 employees, 31.50 percent from

organizations of 250 - 499 people, 14.92 percent form organizations of 500 - 999

employees, and 5.51 percent form organizations of more than 1,000 employees. Table I

and Table II show the distribution of the 393 responding organizations by size.

Distribution of Training and Development Specialists

Research Question One asked: How many organizations in the defined population

have a training and development specialist? Question five and six on the questionnaire

were designed to gather the information. Question five was divided into two segments.

Part A asked: Do you have a staff member who administers or coordinates management

training? If so, what is the person's title? Those responding (n=393) reported a stronger

tendency toward "Yes": 60.56 percent said "Yes"; 39.44 percent answered "No." (See

Table III.) Those responsible for training were most frequently in positions identified as

trainer, manager of management development, education development specialist, director

of employee improvement, human resources manager, training manager, and quality

training manager.

A cross tabulation of the size of the organizations with whether they have a staff

member responsible for management training indicated about an even division between

those who did and those who did not for organizations employing 100-499 employees. Of

those employing 500-999 employees, 86.50 percent of the respondents indicated that they

did have a staff member responsible for management training. Additionally, those

employing less than 50 employees strongly indicated that they did not generally have a

staff member responsible for training (60.72 percent said "No"). Of those employing more

TABLE I

A SUMMARY OF RESPONDENTS BY SIZE OF ORGANIZATION

Number of Employees	Frequency	Percent of Total
Fewer than 50	28	7.09
50 - 99	46	11.81
100 - 249	115	29.17
250 - 499	124	31.50
500 - 999	59	14.92
1,000 or more	21	5.51
Total	393	100.00

TABLE II

A SUMMARY OF RESPONDENTS BY TYPES OF ORGANIZATION

Number of Employees	Frequency	Percent of Total
Manufacturing	151	38.51
Banking/Finance/Insurance	33	8.50
Transportation/Utilities	25	6.30
Business Services	29	7.40
Retail Trade	46	11.60
Public Administration	32	8.12
Health Services	26	6.50
Mining/Construction/Agricultural	21	5.30
Wholesale Trade	14	3.60
Other	16	4.17
Total	393	100.00

TABLE III

A SUMMARY OF RESPONSES FROM ORGANIZATIONS WITH
A STAFF MEMBER WHO ADMINISTERS OR COORDINATES
MANAGEMENT TRAINING

	Frequency Distribution	Percent of Responses
Yes	238	60.56
No	155	39.44
Total	393	100.00

than 1,000 employees, 92.50 percent (20 organizations) reported that they did have a staff member responsible for management training. (See Table IV.)

A cross tabulation of type of organizations with whether they have a staff member responsible for training indicated about an even division between those who did and those who did not, except for manufacturing, transportation/utilities, and public administration. More than two-thirds (68.32%) of public administration oriented organizations indicated they did not have a staff member responsible for training. Manufacturing and transportation/utilities oriented organizations most strongly indicated they did utilize a training and development specialist. (See Table V.)

Question six asked: Is training his/her primary responsibility? To whom does that person report? Only 26.19 percent said that training was the major responsibility of the person administering or coordinating training. (See Table VI.) The person to whom the trainers most frequently reported were a human resources manager, president, training division director, manager of training, owner, or the training manager.

A cross tabulation of the size of the organization with whether they have anyone whose primary responsibility is training indicated a consistent "No", with the exception of organizations larger than 1,000 employees (92.50 percent said "Yes"). As the organizations grew larger, the percent of those indicting "Yes" significantly increased. Organizations with 500-999 employees indicated that 32.40 percent employed someone with management training as a primary responsibility. (See Table VII.)

However, retail trade, business services, manufacturing, transportation/utilities, banking/finance/insurance, and health services ranged from 42-24% "Yes."

TABLE IV

A SUMMARY OF RESPONSES FROM ORGANIZATIONS WITH A
STAFF MEMBER WHO ADMINISTERS OR COORDINATES
MANAGEMENT TRAINING BY SIZE OF
ORGANIZATION

	YES		NO		Total	
	N	%	N	%	N	%
Fewer than 50	11	39.28	17	60.72	28	7.09
50 - 99	31	67.39	16	32.61	46	11.81
100 - 249	58	50.40	57	49.60	115	29.17
150 - 499	67	54.30	57	45.70	124	31.50
500 - 999	51	86.50	8	13.50	59	14.92
1,000 or more	20	92.50	2	7.50	21	5.51
Total	238		155		393	100.00

TABLE V

A SUMMARY OF RESPONSES FROM ORGANIZATIONS WITH A
STAFF MEMBER WHO ADMINISTERS OR COORDINATES
MANAGEMENT TRAINING BY TYPE OF
ORGANIZATION

Type of Organization	Yes		No		Total	
	N	%	N	%	N	%
Manufacturing	110	72.84	41	27.16	151	38.51
Banking/Finance/Insurance	18	54.26	15	45.74	33	8.50
Transportation/Utilities	19	76.84	6	23.16	25	6.30
Business Services	16	53.87	13	46.13	29	7.40
Retail Trade	23	51.29	22	48.71	46	11.60
Public Administration	10	31.68	22	68.32	32	8.12
Health Services	13	49.58	13	50.42	26	6.50
Mining/Construction/Agricultural	12	57.36	9	42.64	21	5.30
Wholesale Trade	7	52.97	7	47.03	14	3.60
Other	9	54.32	7	45.68	16	4.17
Total	238		155		393	100.00

TABLE VI

A SUMMARY OF RESPONSES FROM ORGANIZATIONS WITH A
STAFF MEMBER WHOSE PRIMARY RESPONSIBILITY
IS MANAGEMENT TRAINING

	Frequency Distribution N	Percent of Responses
Yes	103	26.19
No	290	73.81
Total	393	100.00

TABLE VII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS WITH A
STAFF MEMBER WHOSE RESPONSIBILITY IS
MANAGEMENT TRAINING BY SIZE OF
ORGANIZATION

Number of Employees	Yes		No		Total	
	N	%	N	%	N	%
Fewer than 50	0	0.00	28	100.00	28	7.09
50 - 99	4	8.40	42	91.60	46	11.81
100 - 249	25	21.50	90	78.50	115	29.17
250 - 499	35	28.60	87	71.40	124	31.50
500 - 999	19	32.40	40	67.60	59	14.92
1,000 or more	20	92.50	1	7.50	21	5.51
Total	103		290		393	100.00

N = 393

and public administration 94 percent "No." Wholesale trade indicated a 100 percent

"No". (See Table VIII.)

Management Training Activities

Research question two asked: What management training activities are taking

place? Question 22 on the questionnaire was designed to gather that information. It was

divided into two sections to determine when the training was offered, past, present, or

never, and the type of benefit received from the training, tangible, intangible, or none.

(See Table IX.) Respondents chose from a list of 22 program areas categorized

according to the following types: management/leadership, marketing, company-specific,

personal development, and systems training. The area they named as presently being

offered most frequently was Computer Operation (63.27 percent). Computer Operation

was also ranked as number one (63.92 percent) with the highest perceived tangible benefit

received from the training. The second area named as being offered most frequently was

Policies and Procedures (53.47 percent). Policies and Procedures was ranked number 2

(57.30 percent) in perceived tangible benefit received from the training. Ranked as the

number one choice in the intangible column was Written Communications (86.15 percent)

followed by Employee Relations (85.28 percent). Due to the emphasis placed on bottom

line profit and the return on investment dollar the tangible list from Table IX highlights

and ranks the respondents' choices in order of tangible benefit received from the training

presently being offered.

TABLE VIII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS WITH A
STAFF MEMBER WHOSE PRIMARY RESPONSIBILITY IS
MANAGEMENT TRAINING BY TYPE OF
ORGANIZATION

Type of	Yes		No		Total	
Organization	N	%	N	%	N	%
Manufacturing	45	29.73	106	70.27	151	38.51
Banking/Finance/Insurance	8	23.95	25	76.05	33	8.50
Transportation/Utilities	7	28.27	18	71.73	25	6.30
Business Services	10	34.39	19	65.61	29	7.40
Retail Trade	19	41.68	27	58.32	46	11.60
Public Administration	2	6.27	30	93.73	32	8.12
Health Services	6	23.49	20	76.51	26	6.50
Mining/Construction/Agricultural	32	14.40	18	85.60	21	5.30
Wholesale Trade	0	00.00	14	100.00	14	3.60
Other	3	18.31	13	81.69	16	4.17
Total	103		290		393	100.00

TABLE IX

A SUMMARY OF TRAINING OFFERED BY ORGANIZATIONS AND THE PERCEIVED BENEFIT RECEIVED FROM THE TRAINING

Type of Training	WHEN TRAINING OFFERED						BENEFIT RECEIVED FROM TRAINING					
	Present		Past		Never		Tangible		Intangible		None	
	N	%	N	%	N	%	N	%	N	%	N	%
Management Leadership:												
Setting Priorities	151	38.48	214	54.36	28	7.16	96	24.32	280	71.26	17	4.43
Planning/Decision Making	139	35.40	249	63.40	5	1.20	158	40.26	218	55.38	17	4.36
Delegating	128	32.50	167	42.37	99	25.13	131	33.26	247	62.84	15	3.90
Time Management	172	43.75	201	51.27	20	4.98	151	38.46	234	59.43	8	2.11
Financial Management	139	35.47	162	41.31	91	23.22	153	38.94	234	59.56	6	1.50
Staffing	168	42.70	202	51.49	25	5.81	84	21.47	309	78.53	0	0.00
Performance Appraisal	156	39.64	168	42.85	69	17.51	148	37.54	245	62.46	0	0.00
Legal Regulations	125	31.73	172	43.65	97	24.62	153	38.91	240	61.09	0	0.00
Marketing:												
Produce/Service Quality	68	17.40	80	20.36	245	62.24	180	45.78	0	00.00	213	54.22
Product Development	64	16.36	53	13.58	275	70.06	187	47.62	0	00.00	206	52.38
Sales	85	21.56	121	30.82	187	47.62	100	25.37	213	54.31	80	20.32

TABLE IX (Continued)

Type of Training	WHEN TRAINING OFFERED						BENEFIT RECEIVED FROM TRAINING					
	Present		Past		Never		Tangible		Intangible		None	
	N	%	N	%	N	%	N	%	N	%	N	%
Company-Specific:												
Policies and Procedures	210	53.47	170	43.27	13	3.26	225	57.30	168	42.70	0	00.00
Personal:												
Customer Relations	171	43.56	213	54.32	8	2.12	135	34.28	128	32.67	130	33.05
Employee Relations	187	47.50	158	40.31	48	12.19	58	14.72	335	85.28	0	00.00
Interpersonal Communication	170	43.28	187	47.58	36	9.14	62	15.83	331	84.17	0	00.00
Written Communication	160	40.72	172	43.89	60	15.39	54	13.85	339	86.15	0	00.00
Conducting Meetings	173	43.95	214	54.39	7	1.66	94	23.94	61	15.47	238	60.58
Motivation	148	37.56	167	42.37	79	20.07	212	53.95	181	46.05	0	00.00
Systems Training:												
Computer Operations	249	63.27	144	36.73	0	00.00	251	63.92	0	00.00	142	36.08
Accounting	52	13.12	144	36.54	198	50.34	96	24.38	0	00.00	297	75.62
Inventory	100	25.34	123	31.29	170	43.37	121	30.73	0	00.00	272	69.27
Record Keeping	93	23.57	129	32.84	171	43.59	58	14.64	0	00.00	335	85.36

Budgeted Training

Research question three asked: How much training is offered by these

organizations? Questions four and eight through 11 on the questionnaire were designed to

answer this question. Question four asked: Does your company budget funds for

management training? Of those responding, 64.63 percent answered "Yes" and 35.37

percent answered "No". (See Table X.)

A cross tabulation of the size of the responding organizations with whether they

budgeted for management training showed that larger organizations more frequently

budgeted for training. (See Table XI.) Organizations with 50-99 employees were about

evenly divided between those who did (49.30 percent) and those who did not (50.70

percent) budget for training. Organizations with 100-249 employees were almost evenly

divided between those who did (58.70 percent) and those who did not (41.30 percent)

budget for training. Organizations with 250-499 employees indicated that 72.40 percent

did budget for training and 27.60 percent did not. Organizations with 500-999 employees

reported that 84.20 percent did budget for training and 15.80 percent did not. Of the

organizations responding with 1,000 or more employees, 100% (21 organizations)

reported that they do budget funds for management training.

A cross tabulation of the type of organizations with whether they budgeted for

management training indicated about an even division between those who did and those

who did not except for manufacturing and banking/finance/insurance. Other indicated the

largest percentage that budgeted for training; health services and transportation/utilities

TABLE X

A SUMMARY OF RESPONSES FROM ORGANIZATIONS
THAT BUDGET FOR MANAGEMENT TRAINING

	Frequency Distribution N	Percent of Responses
Yes	254	64.63
No	139	35.37
Total	393	100.00

N = 393

TABLE XI

A SUMMARY OF RESPONSES FROM ORGANIZATIONS THAT
BUDGET FOR MANAGEMENT TRAINING BY SIZE
OF ORGANIZATION

Number of Employees	Yes		No		Total	
	N	%	N	%	N	%
Fewer than 50	4	12.60	24	87.40	28	7.09
50 - 99	22	49.30	24	50.70	46	11.81
100 - 249	67	58.70	48	41.30	115	29.17
250 - 499	90	72.40	34	27.60	124	31.50
599 - 999	50	84.20	9	15.80	59	14.92
1,000 or more	21	100.00	0	00.00	21	5.51
Total	254		139		393	100.00

N=393

were next. The most frequently reported type of industry in the other category was engineering and telecommunication services. (See Table XII.)

Question eight asked: What percent of your managers received training this past year? Answers to questions four and eight indicated that about 50-60 percent (mean average 53.85%) of the responding organization's managers received training and that the larger companies were the ones that tended to budget for the training.

A cross tabulation of the size of the organizations and the percent of their managers trained indicated that the size of the organizations made little difference in the percent of their managers trained. (See Table XIII.)

Question nine on the questionnaire asked: How much did you spend training managers this past year? Of those responding, 39.40 percent spent under $2,000; 28.40 percent spent $2,000-$5,000; 17.50 percent spent $5,000-$10,000; 5.40 percent spent $10,000-$20,000; and 9.30 percent spent over $20,000. (See Table XIV.)
A cross tabulation of the size of the organization with the amount spent in training indicated that the larger the company, the larger the expenditure for training. (See Table XV.) Of the 393 respondents to the question, 28 were members of organizations less than 50 employees; 46 were members of organizations of 50-99 employees; 115 were members of organizations of 100-249 employees; 124 were members of organizations of 250-499 employees; 59 were members of organizations of 500-999 employees; and 21 were members of organizations of 1,000 or more employees. Almost one-third (31.40 percent) of the respondents in organizations of 500-999 spent over $20,000 on training. More than half (54.20 percent) of the respondents in organizations of 50-99 spent less than $2,000. Over one-third (39.50 percent) of the respondents in organizations of 100-249 employees

TABLE XII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS THAT
BUDGET FOR MANAGEMENT TRAINING
BY TYPE OF ORGANIZATION

Type of Organization	Yes		No		Total	
	N	%	N	%	N	%
Manufacturing	109	71.96	42	28.04	151	38.51
Banking/Finance/Insurance	19	57.46	14	42.54	33	8.50
Transportation/Utilities	18	73.49	7	26.51	25	6.30
Business Services	12	42.54	17	57.46	29	7.40
Retail Trade	29	62.53	17	37.47	46	11.60
Public Administration	20	63.48	12	36.52	32	8.12
Health Services	19	73.68	73	26.32	26	6.50
Mining/Construction/Agricultural	10	48.36	11	51.64	21	5.30
Wholesale Trade	6	39.84	9	90.16	14	3.60
Other	12	74.68	4	25.32	16	4.17
Total	254		139		393	100.00

TABLE XIII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS TRAINING
MORE OR LESS THAN FIFTY PERCENT OF THEIR MANAGERS
BY SIZE OF ORGANIZATION

Size of	More than 50%		Less than 50%		Total	
Organization	N	%	N	%	N	%
Fewer than 50	12	41.40	16	46.90	28	100.00
50 - 99	25	55.60	21	46.90	46	100.00
100 - 149	58	50.70	57	45.50	115	100.00
150 - 499	65	52.60	59	46.90	124	100.00
500 - 999	34	58.30	25	46.90	59	100.00
1,000 or more	14	64.50	7	39.6	21	100.00

N = 393

TABLE XIV

A SUMMARY OF THE AMOUNT SPENT ON
MANAGEMENT TRAINING

Amount Spent	Frequency	Percent of Responses
Under $2,000	155	39.40
$2,000 - $5,000	112	28.40
$5,000 - $10,000	69	17.50
$10,000 - $20,000	21	5.40
Over $20,000	37	9.30
Total	393	100.00

TABLE XV

A SUMMARY OF THE AMOUNT SPENT ON MANAGEMENT TRAINING
BY SIZE OF ORGANIZATION

Size of Organization	Under $2K %	$2-$5K %	$5-10K %	$10-20K %	Over $20K %
Fewer than 50	54.20	43.50	2.30	00.00	00.00
50 - 99	38.20	41.60	20.20	00.00	00.00
100 - 249	39.50	33.90	26.20	00.00	00.00
250 - 499	39.20	28.90	18.40	7.20	6.30
599 - 999	39.40	7.20	7.40	14.60	31.40
1,000 or more	21.30	7.20	7.40	15.20	48.90

N=393

spent under $2,000. Of the respondents in organizations employing 250-499 staff, 39.20 percent spent under $2,000 and 6.30 percent spent over $20,000 on training.

A cross tabulation of type of organizations and what they spent on training indicated that wholesale trade spent the least. Manufacturing and transportation and utilities spent the most. Although a significant number (73.68 percent) of health services indicated they budgeted for management training, 61.60 percent indicated they budgeted less then $5,000. More than 60 percent of all types of organizations indicated they spent less then $5,000 on management training (See Table XVI.)

Question ten asked: How many total hours did your managers spend in training this past year. The mean was 268 hours and the mode was 1000 hours. The mean percent of managers receiving training was 53.85. Due to probable misunderstanding of the question, the range of responses was 3900 hours (high 4000 - low 100). This variability could have possible been attributed to the interpretation of the question as a single manager or as a total group of managers. The mean number of managers in the organizations was 26. The mean number of managers receiving training was 14. The mean number of total hours a manager spent in training was 19.14.

Question eleven on the questionnaire asked: Do you feel your managers receive adequate training? Those responding indicated the training was "fairly adequate" (62.20 percent). Another 29.13 percent felt the training was "inadequate". However, only 8.66 percent felt the training was "very adequate". (See Table XVII.)

A cross tabulation of the size of the organization with the adequacy of training indicated larger organizations were least satisfied with management training adequacy.

TABLE XVI

A SUMMARY OF THE AMOUNT SPENT ON MANAGEMENT
TRAINING BY TYPE OF ORGANIZATION

Type of Organization	Under $5K		$5K - 10K		More than $10K	
	N	%	N	%	N	%
Manufacturing	96	63.70	28	18.70	27	17.60
Banking/Finance/Insurance	23	69.80	6	18.50	4	11.70
Transportation/Utilities	15	62.50	3	12.50	6	25.00
Business Services	19	63.80	7	25.60	3	10.60
Retail Trade	34	75.30	8	16.50	4	8.20
Public Administration	25	77.60	3	10.70	4	11.70
Health Services	16	61.60	6	22.20	4	16.20
Mining/Construction/Agricultural	15	70.30	0	0.00	6	29.60
Wholesale Trade	11	78.10	3	21.90	0	0.00
Other	12	24.50	4	24.50	0	0.00
Total	267		69		58	100.00

TABLE XVII

A SUMMARY OF THE RESPONDENTS' PERCEIVED
ADEQUACY OF MANAGER TRAINING

	Frequency	Percent of Respondents
Very Adequate	34	8.66
Fairly Adequate	244	62.20
Inadequate	114	29.13
Total	100	100.00

Zero (0) percent of the organizations with 500-999 employees indicated the training as "very adequate". Organizations with 250-499 employees were closely divided between "inadequate" (41.3 percent) and "fairly adequate" (54.30 percent). Organizations with fewer than 250 employees indicated fairly adequate manager training as the dominant response. (See Table XVIII.)

A cross tabulation of type of company with the adequacy of management training indicated the majority felt training was fairly adequate. Public Administration (20.04 percent) was the most satisfied. (See Table XIX.)

Delivery of Management Training

Research question four asked: How are the current management training initiatives being delivered? Question seven on the questionnaire--how are the managers being trained?--was designed to answer this question. Ranked in order of priority, the respondents (N=393) indicated the following sources of training programs:

1. 68.4% In-house, company developed and presented training programs.

2. 49.5% In-house, private firm developed and presented training programs.

3. 37.4% Off-site, company developed and presented training programs.

4. 27.4% Off-site, private firm developed and presented training programs.

5. 25.4% Training delivered by a vocational-technical school.

6. 22.4% Training delivered by a college/university.

7. 15.3% Other--professional organizations most frequently cited.

TABLE XVIII

A SUMMARY OF THE RESPONDENTS' PERCEIVED ADEQUACY
OF MANAGER TRAINING BY SIZE OF
ORGANIZATION

Size of Organization	Inadequate %	Fairly Adequate %	Very Adequate %
Less than 50	22.30	62.40	15.30
50 - 99	25.40	67.40	7.20
100 - 249	25.30	56.40	18.30
150 - 499	41.30	54.30	4.40
500 - 999	24.00	76.00	0.00
1,000 or more	17.00	83.00	8.00

N = 393

TABLE XIX

A SUMMARY OF THE RESPONDENTS' PERCEIVED ADEQUACY
OF MANAGER TRAINING BY TYPE OF ORGANIZATION

Type of Organization	Adequate		Fairly Adequate		Very Adequate	
	N	%	N	%	N	%
Manufacturing	54	36.00	87	57.30	10	6.70
Banking/Finance/Insurance	7	20.10	22	65.30	5	14.60
Transportation/Utilities	5	21.30	19	76.70	0	2.00
Business Services	7	24.60	19	64.30	3	11.10
Retail Trade	11	25.19	31	67.41	3	7.50
Public Administration	8	26.48	17	53.22	7	20.40
Health Services	7	26.30	19	73.70	0	0.00
Mining/Construction/Agricultural	6	27.40	12	58.34	3	14.30
Wholesale Trade	8	60.00	6	40.00	0	0.00
Other	0	0.00	13	80.00	3	20.00
Total	114		244		343	

Training Limitations

Research question five asked: What limits training opportunities for managers? Question 16 on the questionnaire asked: What interferes with your managers receiving training? Most frequently cited was time it takes to train (38.5 percent). Second most frequently cited was lack of staff to offer training (26.30 percent). Location of training was third under "frequently" (25.30 percent). Cited first under "some" was lack of time to plan training (49.50 percent). Time, no staff to offer, and location were the top three under the combination of both "frequently" and "some". Cited least for interference in training was manager unwillingness. (See Table XX.)

Training Needs Assessment

Research question six asked: How many assess their managers' training needs? Questions 12-15 and 21 were designed to answer this question. Question 12 asked: Do you know what your managers' training needs are? On a scale of 1 (no) to 5 (yes), the mean was 3.6. More of the respondents said they knew their managers' training needs (92.21 percent "somewhat 3" to "yes 5") than said they did not know their managers training needs (7.79 percent "somewhat 2" to "no 1").

A cross tabulation of size of organizations with whether the organization knew the managers' training needs indicated that the organizations employing 500-999 employees chose "somewhat" (55.00 percent) more then any other size organization. Not a single respondent in the 500-999 and 1,000 or more size organizations reported they did not know their managers' training needs. The other organizations were more evenly

TABLE XX

A SUMMARY OF WHAT RESPONDENTS PERCEIVE
INTERFERES WITH TRAINING

	Frequently	Some	Not At All
Time			
Frequency	151	171	71
Percent of Respondents	38.5	43.5	18.0
Cost			
Frequency	81	190	123
Percent of Respondents	20.5	48.3	31.2
Location			
Frequency	99	171	122
Percent of Respondents	25.3	43.6	31.1
Training Unavailable			
Frequency	52	151	190
Percent of Respondents	13.2	38.4	48.4
Lack of Planning Time			
Frequency	76	195	123
Percent of Respondents	19.3	49.5	31.2
Lack of Staff to Train			
Frequency	103	191	99
Percent of Respondents	26.3	48.5	25.2
Manager Unwillingness			
Frequency	21	143	229
Percent of Respondents	5.3	36.4	58.3
No One To Coordinate			
Frequency	72	151	170
Percent of Respondents	18.3	38.4	43.3

distributed between "somewhat" and "yes" when asked if they knew their managers' training needs. (See Table XXI.)

A cross tabulation of type of organization with whether the organization knew their managers' training needs indicated that more than 50 percent of the organizations felt they knew their managers training needs. Public Administration indicated the strongest "yes." Manufacturing indicated the fewest "no" responses. Health services and wholesale trade had the most "no" responses. (See Table XXII.)

Question 13 asked: Has a needs assessment been performed in your company within the past three years to determine managers' training needs? The 393 respondents answered as follows: Yes = 25.40 percent, No = 66.30 percent, and Don't know = 8.30 percent.

A cross tabulation of size of organization with whether they had performed a needs assessment indicated more then 50 percent had not or did not know in organizations less then 999 employees. Those with fewer than 250 employees most strongly indicated that they did not perform needs assessments. Organizations employing 500-999 were more evenly divided between those who had and those who had not. Those with greater than 1000 employees most strongly indicated that they did perform needs assessments (51.60 percent). (See Table XXIII.)

A cross tabulation of type of organization with whether they had performed a needs assessment in the past three years indicated more than 50 had not or did not know. Retail trade most frequently indicated they had performed a needs assessment. Wholesale

TABLE XXI

A SUMMARY OF RESPONSES FROM ORGANIZATIONS THAT
REPORT KNOWLEDGE OF MANAGERS' TRAINING
NEEDS BY SIZE OF ORGANIZATION

Size of Organization	No (1) %	Somewhat (2-4) %	Yes (5) %
Less than 50	16.00	37.00	47.00
50 - 99	11.00	28.00	61.00
100 - 249	11.00	30.00	59.00
250 - 499	3.00	47.00	50.00
500 - 999	0.00	55.00	45.00
1,000 or more	0.00	34.00	66.00

N = 393

TABLE XXII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS THAT
REPORT KNOWLEDGE OF MANAGERS' TRAINING
NEEDS BY TYPE OF ORGANIZATION

Type of Organization	No (1)		Somewhat (2-4)		Yes (5)	
	N	%	N	%	N	%
Manufacturing	4	2.60	58	38.50	89	58.90
Banking/Finance/Insurance	3	9.60	11	33.50	19	56.90
Transportation/Utilities	3	12.04	7	28.40	15	59.60
Business Services	3	11.00	10	35.40	16	53.60
Retail Trade	3	7.60	22	48.60	20	43.80
Public Administration	2	7.00	10	32.70	19	60.30
Health Services	2	9.00	11	43.50	12	47.50
Mining/Construction/Agricultural	2	12.06	12	57.60	6	30.40
Wholesale Trade	2	17.00	5	36.50	7	46.50
Other	0	00.00	8	50.00	8	50.00
Total	26		156		211	

TABLE XXIII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS
THAT PERFORM NEEDS ASSESSMENTS BY
SIZE OF ORGANIZATION

Size of Organization	Yes		No		Do Not Know		Total	
	N	%	N	%	N	%	N	%
Less than 50	5	16.30	21	76.40	2	7.30	28	7.09
50 - 99	9	20.60	32	70.30	4	9.10	46	11.80
100 - 249	19	16.30	80	69.30	17	14.40	115	29.27
250 - 499	33	26.60	85	68.20	6	5.20	124	31.50
599 - 999	23	39.50	34	57.40	2	2.10	59	14.92
1,000 or more	11	51.60	9	41.50	1	6.90	21	5.41

N=393

trade indicated the fewest number of respondents indicating they had performed a needs assessment. (See Table XXIV.)

Question 14 asked: Which criteria are used to determine manager training needs? The respondents ranked the criteria as follows: need for performance improvement, new hire required, manager requests, and new technology required. Table XXV shows the percentage of each criteria as indicated by the respondents.

Question 15 asked, Who determines which managers receive training? The respondents' (N=393) answers in rank order follows:

1. Chief Executive Officer 67.8%

2. Personnel Department 48.6%

3. Immediate Supervisors 45.8%

4. Manager himself/ herself 32.6%

Question 21 asked: Does your company evaluate manager training? Formal evaluation? Informal evaluation? Those responding (N=393) indicated "Yes" (69.98 percent) more than "No" (30.02 percent). The evaluation, according to those who answered "Yes", was more "informal" (76.45 percent) than "formal" (23.55 percent).

A cross tabulation of size of organization with whether they evaluated manager training indicated a significant increase in those that did when the organizations employed 250 or more employees. Organizations with fewer than 250 employees were about evenly divided between those who did and did not evaluate manager training. (See Table XXVI.) A cross tabulation of type of organization with whether they evaluated manager training indicated about an even division between those who did and those who did not.

TABLE XXIV

A SUMMARY OF RESPONSES WITHIN ORGANIZATIONS THAT
PERFORM NEEDS ASSESSMENTS BY TYPE OF
ORGANIZATION

Type of Organization	Yes		No		Don't Know	
	N	%	N	%	N	%
Manufacturing	33	21.90	100	66.40	18	11.70
Banking/Finance/Insurance	11	33.20	18	54.70	4	12.10
Transportation/Utilities	3	12.30	18	72.16	4	15.60
Business Services	11	37.40	18	62.60	0	0.00
Retail Trade	18	40.20	26	57.80	1	2.00
Public Administration	7	21.80	22	67.50	3	10.70
Health Services	10	38.40	16	61.60	0	0.00
Mining/Construction/Agricultural	4	17.30	15	73.20	21	9.50
Wholesale Trade	0	00.00	14	100.00	0	0.00
Other	3	20.00	13	80.00	0	0.00
Total	100		261		32	

TABLE XXV

A SUMMARY OF THE RESPONDENTS' PERCEIVED CRITERIA
DETERMINING MANAGER TRAINING NEEDS

	Frequency	Some	Not At All
Performance Improvement			
Frequency	140	213	40
Percent of Respondents	35.7	54.2	10.1
Manager Request			
Frequency	135	245	13
Percent of Respondents	34.4	62.3	3.3
New Technology Required			
Frequency	128	219	46
Percent of Respondents	32.5	55.5	11.8
New Hire Required			
Frequency	139	206	48
Percent of Respondents	35.4	52.5	12.1

TABLE XXVI

A SUMMARY OF RESPONSES FROM ORGANIZATIONS THAT
EVALUATE MANAGEMENT TRAINING BY SIZE
OF ORGANIZATION

Number of	Yes		No		Total	
Employees	N	%	N	%	N	%
Fewer than 50	15	52.40	13	47.60	28	7.09
50 - 99	26	55.40	20	44.60	46	11.81
100 - 249	63	55.10	52	44.90	115	29.17
250 - 499	92	74.30	32	25.70	124	31.50
599 - 999	53	90.20	5	9.80	59	14.92
1,000 or more	20	92.50	1	7.5	21	5.51

Total N=393

More Wholesale trade, retail trade, and health services indicated they evaluate manager training. (See Table XXVII.)

Type, Source, and Methods of Training

Research question seven asked: What preferences do these organizations have concerning type, source, and methods of training? Questions 17-19 and 20 on the questionnaire were designed to answer this question.

Question 19 asked: Which of the following training would you like to offer or continue to offer your managers? Respondents chose from a list of 22 program areas categorized according to the following types: management/leadership, marketing, company-specific, personal development, and systems training.

The following list ranks the respondents' choices (N=393) in order of preferences:

1.   73.40%   Planning/ Decision making (Management/Leadership)

2.   70.20%   Delegating (Management/Leadership)

3.   69.40%   Time management (Management/Leadership)

4.   68.50%   Employee relations (Personal)

5.   67.30%   Motivation (Personal)

6.   66.20%   Setting priorities (Management Leadership)

7.   65.20%   Computer Operation (Systems Training)

8.   64.10%   Performance appraisal (Management/Leadership)

9.   61.30%   Customer relations (Personal)

10. 58.40%   Interpersonal communication (Personal)

TABLE XXVII

A SUMMARY OF RESPONSES FROM ORGANIZATIONS THAT
EVALUATE MANAGEMENT TRAINING BY TYPE
OF ORGANIZATION

Type of	Yes		No		Total	
Organization	N	%	N	%	N	%
Manufacturing	105	69.40	46	30.60	151	38.51
Banking/Finance/Insurance	21	63.40	12	36.60	33	8.50
Transportation/Utilities	17	67.40	8	32.60	25	6.30
Business Services	19	64.40	10	35.60	29	7.40
Retail Trade	35	76.30	11	23.70	46	11.60
Public Administration	18	55.30	14	44.70	32	8.12
Health Services	20	77.40	6	22.60	26	6.50
Mining/Construction/Agricultural	10	47.50	11	52.50	21	5.30
Wholesale Trade	11	80.00	3	20.00	14	3.60
Other	13	81.50	3	18.50	16	4.17
Total	268		125		393	100.00

11.	55.20%	Written communications (Personal)
12.	53.20%	Policies and Procedures (Company - Specific)
13.	50.50%	Sales (Marketing)
14.	47.30%	Financial/Budgeting (Management Leadership)
15.	44.50%	Product/Service quality (Marketing)
16.	42.30%	Legal regulations (Management/Leadership)
17.	40.40%	Inventory (Systems Training)
18.	48.70%	Staffing (Management/Leadership)
19	44.60%	Conducting meetings (Personal)
20.	41.50%	Record Keeping (Systems Training)
21.	26.40%	Accounting (Systems training)
22.	22.50%	Product development (Marketing)

Question 20 asked: the respondents to rank sources and methods of training they would choose to satisfy managers' training needs. The types of training were the categories listed in the question above. Respondents ranked their first preferences as number one. Self-paced or self-instruction (books), computer-assisted, packaged (video/ audio assisted), and classroom (lecture/ discussion/ activity) were the method choices given the respondents.

The method they named as first choice for all types of training was classroom (lecture/discussion/activity). The second choice of method, for all types of training except systems and personal, was packaged (video/ audio assisted). The third choice was computer assisted, except for Personal. It ranked fourth for personal. (See Table XXVIII.)

TABLE XXVIII

A SUMMARY OF THE MEAN RANKS FOR METHOD
OF TRAINING PREFERENCES BY
TYPE OF TRAINING

Type of Training	Self-Paced (Books)	Computer-Assisted	Packaged	Classroom
Management/Leadership	2.99	2.86	2.40	1.53
Marketing	3.08	2.86	2.35	1.81
Company-Specific	2.95	2.95	2.50	1.65
Personal	2.80	2.91	2.50	1.92
Systems	3.14	2.01	2.91	1.88

Rank 1- 4   1 = First Preference

The source of training choices given respondents were area vocational-technical schools, university/colleges, their own company (in-house), or private consulting/ training firms. Respondents ranked their first preference as number one. The source of training the respondents named as first choice for management/ leadership training was private consulting/ training firms. (See Table XXIX.) The first choice for marketing and company/specific training was in-house. The first choice for personal, and systems training, and management/leadership was area vocational-technical schools. Second choice for management/leadership and systems training was in-house. For, the management/leadership training the third choice of sources was private firms. University/ college consistently were chosen fourth as a source of training.

TABLE XXIX

A SUMMARY OF THE MEAN RANKS FOR SOURCE
OF TRAINING PREFERENCES BY
TYPE OF TRAINING

Type of Training	Area Vo-Tech	University/College	In-House	Private Firm
Management/Leadership	2.20	2.96	2.22	2.73
Marketing	2.63	2.78	2.25	2.55
Company-Specific	2.42	3.40	1.42	2.88
Personal	2.13	2.78	2.33	2.87
Systems	1.98	2.93	2.12	3.00

Rank 1 - 4   1 - First Preference

CHAPTER V

FINDINGS, CONCLUSIONS, AND

RECOMMENDATIONS

The focus of the study was, What management training needs exist and what

current training activities are taking place within the business and industry environment in

Oklahoma? Indicators suggest that large business and industry organizations do most of

management training; while smaller organizations have a need for management training but

do little training with the current resources available. The review of literature indicated

that small and mid-sized organizations have a higher need for management training and

until recently this size of organization has not seen the usefulness and/ or financial return

from this type of training. The literature review also indicated that organizations without

an individual directly in charge of management training are the ones with the most obvious

need.

The purpose of the study was to examine management training needs and current

training activities in the defined study population in order to provide more adequate

information to those making management training decisions and those providing the

training. The study was designed to provide organizations with information related to the

strengths and weaknesses of management training activities within the identified

organizations. It was also designed to give a better understanding of how those offering

management training might best assist the identified organizations in their management training efforts.

The following questions were designed to answer the basic focus of the study:

1. How many organizations in the defined population have a training and development specialist?

2. What management training activities are taking place?

3. How much management training is offered by these organizations?

4. How are the current management training initiatives being delivered?

5. What limits training opportunities for managers?

6. How many assess their managers training needs?

7. What preferences do these organizations have concerning type, source, and methods of training?

The economic climate in Oklahoma at the time of the survey was in a steady upturn. According to the literature, economic upturns normally lead to increased training and expansion. This was certainly a contributor to the return rate of 92.04 percent of the study participants. After a follow-up of non-respondents the 393 responses to the 427 questionnaires delivered to those in the population were considered adequate. The follow-up of non-respondents indicated no significant differences between them and the respondents. The results of the study profiled management training in Oklahoma so that generalizations could be made to the types of business and industry organizations surveyed.

The study was designed to provide information to two groups: organizations wanting to provide management training to their employees and those wanting to assist

those organizations in their management training, particularly the Oklahoma Department of Vocational Technical Education. The study will enable those providing training programs to choose the most appropriate training for a given situation, how much to budget for the training, and determine what training methods are best suited to meet individual participant needs. They can also determine how they compare with organizations of like size in their efforts to provide management training. Those providing the training can use the information in this study to determine the types of management training programs to offer and the methods to use when delivering the training.

Findings

Responses to the 22 item questionnaire designed to answer the seven research questions were tabulated from the 393 respondents that fit the designated population. Cross tabulation of the size of organizations and type of organizations with various questions indicated the effect that size and type of organization had on management training.

Finding #1

The data indicated that approximately 60% of the organizations have a training and development specialist. Additionally, organizations tended to have a person in charge of management training when the staff total was 250 or above. The data also indicated that when organizations had a person in charge of training, it was that person's primary responsibility if the staff total was 500 or more.

Finding #2

The data indicated that training currently being offered to business and industry organizations in Oklahoma includes computer operation in almost every size and type of organization. Likewise, policies and procedures, employee relations, conducting meetings, time management, customer relations, interpersonal communications, and staffing were offered by over 42% of the organizations. Topics reported as the most tangible benefit were motivation, product development, product/service quality, planning/decision making, financial management, and legal regulations.

Finding #3

The data indicated that sixty-five percent (65%) of the organizations budgeted funds for management training. Furthermore, respondents indicated an expenditure over $20,000 during the past year if they had 500 or more employees. Organizations with 500 or more employees reported only "fairly adequate" or "inadequate" in response to their attitude toward the management training currently delivered. The data analyzed generally reflected that the large and mid-sized organizations are training 50 percent or more of their managers, but management training is not a strong priority overall.

Finding #4

Respondents indicated that two-thirds (68.04 %) of their managers were trained in-house through company developed training programs. Additionally, there seemed to be a strong preference (49.5%) for private firms as the source of training.

Finding #5

Respondents indicated that lack of time to plan the training (38.5%), lack of staff to offer the training (26.3%), and location of training (25.3%) limits training opportunities for managers. This is consistent with the limiting factors cited in the literature review as barriers to offering management training.

Finding #6

The data indicated that only 25.4% of the organizations had performed a needs assessment in the past three years. However, 92.21% of the organizations reported that they had at least some knowledge of their managers training needs. The respondent reported that the need for training was most frequently determined by the need for performance improvement.

Finding #7

The data indicated that the types of management training most preferred were leadership and personal development skills. Furthermore, respondent preferences for training and methods of delivery were in-house with vocational-technical schools providing the training in a classroom setting. The study does not differentiate between technical "hard" skills training rather than conceptual skills or "soft" skills training. The data indicated that the respondents had a preference for five "soft" skills programs (motivation, planning/decision making, time management, and performance appraisal, product/service quality) and five "hard" skill programs (computer operation, policies and

procedures, product development, financial budgeting, and legal regulations) in the top ten.

Conclusions

Conclusion #1

The number of organizations that have a coordinator whose primary responsibility is training and development indicated that management training among business and industry organizations in Oklahoma was a priority in organizations with 500 or more employees. Moreover, the number of managers trained the past year, the number of organizations budgeting for the training, and the dollars spent indicated the lack of emphasis on management training in organizations with fewer than 500 employees.

Conclusion #2

Management training currently being offered to business and industry in Oklahoma includes the following: computer operation, policies and procedures, employee relations, conducting meetings, time management, customer relations, interpersonal communications, and staffing. Respondents indicated that these topics were presently being offered to their organization and employees. The Oklahoma Vocational Technical System must continue to offer courses with these topics and provide support for company specific topics.

Conclusion #3

The size of the organization has the biggest effect on the amount and variation of training offered managers. At least half of the managers in all of the organizations in the past year were trained. The larger the organization, the more likely it was for a manager to receive training and for the organization to budget funds specifically for management training. Almost two-thirds of the managers in organizations of 250 and above employees received training in the past year. When organizations reach 250 employees, the data indicated they employed someone with some or all of their responsibility being management training.

Conclusion #4

It was rather evident that managers were trained in-house through company developed training programs. However, there seems to be an apparent preference for vocational-technical schools as the source of training along with an indication to continue future programming. The size of the organization made little difference in the attitude toward the adequacy of the management training. The addition of training coordinators in the larger organizations made little difference in the attitude toward the adequacy of training. In fact, the organizations with 500 or more employees reported only "fairly adequate" or "inadequate" in response to their attitude toward the management training.

Conclusion #5

It was further apparent that lack of time to plan the training, lack of staff to offer

the training, and the location of training most commonly interfered with management

training. This is very similar to the factors cited in the literature review as affecting the

amount of management training provided in organizations.

Conclusion #6

The majority of the organizations and managers have no recorded process for

determining training needs but do evaluate the impact of the management training they do.

It was evident that the respondents knew, at least somewhat, their managers' training

needs. However, the absence of needs assessment over time seems to indicate a lack of

commitment toward management training. When asked who determines which managers

receive training, the most frequent answer was the chief executive officer. The majority

indicated they evaluate management training, but over three-fourths said it was an

informal evaluation.

Conclusion #7

It was also obvious from the findings that the areas of management training needed

were in leadership and personal development skills, while preferences for training and

methods of delivery were in-house with vocational-technical schools providing the training

in a classroom setting. This study gives a clear picture of management training activities

in the business and industry in Oklahoma so that an organization can see where it fits

compared to others of similar type and size. Furthermore, it was also evident that management training was perceived as needed and that larger organizations have a great understanding and desire to accommodate that need.

Recommendations

Recommendation #1

In order to successfully implement any training or improvement initiatives, representatives from the delivering organization must know the customer's business better then they do. The organization that participated in the study indicated that most of them did have a training and development specialist. A relationship must be formed by the delivering organizations before the needs of the organization come become apparent. To adequately meet the management training needs of business and industry organizations in Oklahoma, the first and most obvious step would be to perform a needs assessment to identify the training needs. Successful needs analysis requires an in-depth knowledge of an organization, typically achieved only through a strong relationship between the provider and the customer.

Recommendation #2

The Oklahoma Vocational Technical System must offer the management training topics reported as preferences. Those included motivation, planning/decision making, time management, and performance appraisal, product/service quality, computer operation, policies and procedures, product development, financial budgeting, and legal

regulations. Many of the training programs mentioned in this study have traditionally been taught in MBA (Master of Business Administration) programs around the country. The emphasis—critical and strategic thinking skills. The programs offered to business and industry management personnel must broaden interests and extend the habit of inquiry and reflection; they must sharpen awareness of the organizations current social, political, and economic climate; and they must lay the groundwork for a continual program of self-development.

Recommendation #3

The organizations who offer management training and those who request it should recognize the differences in delivering training to large, mid-sized, and small organizations. The Oklahoma Vocational Technical System has made strides in this area. By offering multi-client programs that allow smaller organizations the opportunity to receive the same quality of management training, once reserved for only the large and wealthy organizations, they can share the costs with other small to mid-sized organizations desiring management training. Additionally, they gain the benefit of exposure to new and possibly innovative approaches used by other non-competing organizations.

Recommendation #4

Training providers should also take note of the different wants and needs identified by organizations within the needs assessment process. The more appropriate the training the greater the likelihood that the organization would be satisfied. From the literature review, the issue of return-on-investment should also be addressed. The Oklahoma

Vocational Technical System must educate the consumers of these programs that it is an investment and must be prepared to show a return-on-investment. This would certainly give the organization and the supplier of training the direction needed to identify a starting point for making management training decisions. The evaluation of the training through return-on-investment could also allow the organization to judge whether the training has met their needs or will be useful in similar situations in the future.

Recommendation #5

The Oklahoma Vocational Technical System must continue to support the organizations with 500 or more employees, as well as, place an emphasis on eliminating the constraints that force mid-sized to small organizations from participating in management training—specifically, lack of staff to offer the training. The Oklahoma Vocational Technical System has long prided itself on its' ability to support business and industry organizations through state of the art facilities and the coordination and delivery of training programs. Constraints cited were lack of time to plan the training, lack of staff to offer the training, and location of training.

Recommendation #6

The majority of the organizations and managers have no recorded process for determining training needs but do evaluate the impact of the management training they do. The majority indicated they evaluate management training, but over three-fourths said it was an informal evaluation. The organizations that trained the most seemed to spend the most, other than the smallest organizations represented. They trained more managers with

less dollars, an important point of efficiency deserving further study. Much of the research

conducted in this area presents models and theories of how to measure the effectiveness of

training or how to measure the return per dollar invested in training. The implementation

of these models and the effectiveness of the training being delivered in comparison to the

number of dollars being spent on each manager each year represents an important area of

study. Is it too much, or is it not a sufficient amount?

Recommendation #7

Another recommended area of study is the training program preferences of these

organizations. Both the organizations receiving and delivering management training

should recognize that the "soft" skill programs area was reported as needed and as a

preference. They also reported the "soft" skills programs as delivering the most tangible

benefit. In many ultramodern classrooms with the latest equipment, management is

trained for new processes, product diversification, multi-plant development and

decentralized organization in large companies. Appropriate programs must be made

available and offered to all sizes and types of organizations.

Recommendation #8

A final recommended area of study is the preference for source of training. Many

private and public organizations have entered the field of training and development.

Those in the public sector have been accused of duplication of resources. This study

addressed the Oklahoma Vocational Technical System as a provider of management

training. The university system was also listed as a potential provider of training by

several respondents. Therefore, a recommended area of study should ask: How well is the university system doing as a provider of management training and are they duplicating a service that is already provided?

This study was the first time the management training in Oklahoma has been examined from a group focus. The amount of interest that it has generated from the participating organizations is an indication that a more intense effort to examine training being delivered and to determine training needs present is desired from the business and industry community. The participating organizations reported a need for more effective organizational and management development. The organizations involved in the study offer the Oklahoma Department of Vocational Technical Education an opportunity to enhance the quality of their management development and professional services to satisfy a growing and critical need.

REFERENCES

Campbell, J. (1988). Training design for performance improvement. In Campbell, J. P. & Campbell, R. J. (Eds.) Productivity in organizations: New perspectives from industrial and organizational psychology. San Francisco, CA: Jossey-Bass, p. 177-215.

Carnevale, A. P. & Schultz, E. R. (1990). Economic accountability for training: Demands and responses. Training and Development Journal, S-2 to S-3.

Carnevale, A. P. & Schultz, E. R. (1990). Strategic accounting. Training and Development Journal, S-4 to S-8.

Catalanello, R & Redding, J. (1989). Three strategic training roles. Training and Development Journal. 51-54.

Condit, P. M. (1997, February). Executive Management Briefings presented by The College of Business Administration Oklahoma State University and the Executive Management Briefings Sponsors, Changing to Stay Ahead in a Rapidly Changing World Marketplace. Luncheon and Presentation from the Executive Management Briefings, Oklahoma City, OK.

Davis, S & Botkin, J. (1995). The monster under the bed. New York, NY: Touchstone.

Dewey, J. (1909, 1959). Moral principles in education. Carbondale, IL: Southern Illinois Press.

Dillman, Don A. (1991). The design and administration of mail surveys, Annual Review of Sociology 17: 225-49.

Dionne, P. (1996). The evaluation of training activities: A complex issue involving different stakes. Human Resource Development Quarterly, 7 (3), 279-286.

Dixon, N. (1991). Relationship between training responses on participant reaction forms and posttest scores. Human Resource Development Quarterly, 1 (2), 129-137.

Elenburg, M. J. (1986). A survey of management training activities in mid-sized organizations in Oklahoma. Unpublished doctoral dissertation, Oklahoma State University, Stillwater.

Ellinger, A. D., Watkins, K., and Barnas, C. (1996). Issues in using managers as instructors: The qualitative perspective. Proceedings of the Academy of Human Resource Development.

Galen, M., Palmer, A. T., Cuneo, A., and Maremont, M., (1993), Work & Family, Business Week, (p. 82).

Gange, R. M. (1962). Military training and principles of learning. American Psychologist, 17 (2), 83-91.

Gilbert, T. F. (1978). Human Competence. New York, NY: McGraw-Hill. (pp. 13-72).

Gill, S. J. (1995,May). Shifting gears for high performance. Training & Development, 49 (5), 25-31.

Goldstein, I. L. (1986). Training in organizations, needs assessment, development, and evaluation. Belmont, CA: Wadsworth, Inc.

Golembiewski, R. T. & Sun, B. (1990). QWL improves worksite quality: Success rates in a large pool of studies. Human Resource Development Quarterly.

Gove, P. (1981). Webster's third new international dictionary of the English language unabridged. Springfield, MA: Merriam-Webster Inc.

Gupta, K. (1996). Conducting a mini needs assessment. Info-Line. Alexandria, VA: American Society for Training and Development.

Hatcher, T. G. & Ward, S. (1997). Framing: A method to improve performance analyses. Performance Improvement Quarterly, 10 (3) 84-103.

Hirsh, D. & Wagner, D. A. (1995). What makes workers learn: The role of incentives in workplace education and training. Cresskill, NJ: Hapton Press, Inc.

Holton, E. (in press). The flawed four-level evaluation model. Human Resource Development Quarterly. Proceedings of the Academy of Human Resource Development.

Hough, J. R. (1996). Management Development Simulations: Effective or Not? Huberty, T. & Kramlinger, T. (1990, December). Behaviorism versus humanism. Training & Development, 44 (12), 41-45.

Lane, D. C. (1995). On a resurgence of management simulations and games. Journal of the Operational Research Society, 46, 604-625.

Jacobs, R. L. & Jones, M. J. (1995). Structured on-the-job training: Developing expertise in the workplace. San Francisco, CA: Berrett-Koehler.

Kaplan, R. S. & Norton, D. P. (1995). The balanced scorecard - Measures that drive performance. In S. Mark Young (ed.), PP. 248-256. Reading in management accounting. New York, NY: Prentice-Hall.

Key, James P. (1997). Research design. Stillwater, OK: Oklahoma State University.

Knorr, K. (In Process). Adapting Performance Analysis for Training to Veterinary Madicine. Unpublished doctoral dissertation, Oklahoma State University, Stillwater.

Krejcie, R. V. & Morgan, D. W. (1970). Determining sample size for research activities, Educational and Psychological Measurement, 30, 607-610.

Kunneman, D. E. (1995). A study of business and industry's current management training activities and training needs within Meridian Technology Center's CEO network group. Unpublished masters thesis, Oklahoma State University, Stillwater.

Lewis, T. & Bjorkquist, D. C. (1992). Needs assessment - A critical reappraisal. Performance Improvement Quarterly, 5 (4), 33-54.

Lewis, T. (1996). Instructional thoughts of HRD practitioners. Proceedings of the Academy of Human Resource Development.

Mariotti, J. (1997). Jigsaw-puzzle lessons: For managers, there's no "picture on the box." Industry Week, 1 (1), 29.

Marshall, C., & Rossman, G. G. (1988). Designing qualitative research. Newberry Park, CA: Sage Publications.

McLagan, P. A. (1989). The models: Models for HRD practice. Training and Development Journal, 1-7, 49-59.

Moseley, J. L & Heaney, M. J. (1994). Needs assessment across disciplines. Performance Improvement Quarterly, 7 (1), 60-79.

Mosier, N. R. (1990). Financial analysis: The methods and their application to employee training. Human Resource Development Quarterly, 1 (1), 45-63.

Perelman, L. (1984). The learning enterprise: Adult learning, human capital and economic development. Washington, DC: Council of State Planning Agencies.

Russ-Eft, D., Preskill, H., & Sleezer, C. (1997). Human resource development review: Research and implications. Thousand Oaks, CA: .Sage.

Rossett. A. (1992). Analysis of human performance problems In Harold D. Stolovitch and Erica J. Keeps (Eds). Handbook of human performance technology. San Francisco, CA: Jossey-Bass.

Rummler, G. A. & Bache, A.P. (1990). Improving performance: How to manage the white space on the organization chart. San Francisco, CA: Jossey-Bass. (pp. 5-14).

Salant, P. & Dillman, D. A. (1994). How to conduct a Survey. New York, NY: John Willey & Company.

Sashkin, M. & Burke, W. W. (1987). Organizational Development in the 1980's. Journal of Management. 13 (2), 393-417.

Silber, K. & Stelnicki, M. (1987). Writing training materials. In R. Craig (Ed.). Training and Development Handbook, 3rd Edition. New York, NY: McGraw Hill, p. 263-285.

Siegal, Sidney. (1956). Nonparametric statistics for the behavioral sciences. New York, NY: McGraw-Hill Book Company.

Sleezer, C. M. & Swanson, R. A. (1989). Is your training department out of control? Performance and Instruction Journal, 28 (5), 22-26.

Sleezer, C. M. (1990). The development and validation of a performance analysis for training model (Project No. 39). St. Paul, MN : University of Minnesota, Training and Development Research Center.

Sleezer, C . M. (1991). Developing and validating the performance analysis for training model. Human Resource Development, 2 (4), 355-372.

Sleezer C. M. (1995). Using performance analysis to assess future technical training needs. In Jack J. Phillips, E. Holton (Ed.), In Action: Conducting Needs Assessment. pages 241-253.

Sleezer, C. M. (1996). Using performance analysis for training in an organization implementing integrated manufacturing: A case study. Performance Improvement Quarterly, 9 (2), 25-41.

Sleezer, C. M. & Maile, C. A. (1997). Needs Assessment in Practice. Proceedings of the Academy of Human Resource Development.

Sleezer, C. M. & Kunneman, D. E. (1997). Seminal HRD research. The Forum. Academy of Human Resource Development, 5 (2), 3.

Swanson, R. A. (1982). Industrial training. In H.E. Mitzel (Ed.) Encyclopedia of Educational Research, New York, NY: Macmillan. 864-870.

Swanson, R. A. (1992). Demonstrating financial benefits to clients. In H. Stolovitch & D. Keeps (Eds.) Handbook of Human Performance Technology, San Francisco, CA: Jossey-Bass, p. 602-618.

Swanson, R. A. & Law, B. (1993). Whole-part-whole learning model. Performance Improvement Quarterly, 6 (1), 43-53.

Swanson, R. A. (1994). Analysis for improving performance. San Francisco, CA: Berrett-Koehler.

Tannenbaum, S. I. & Yukl, G. (1992). Training and development in organizations. Annual Review of Psychology. 43, 399-441.

Training Magazine. (October, 1997). Industry report: An overview of employee training in America. 34 (10).

Watkins, K. & Marsick V. (1989). Paradoxes human resource developers face. Management Education and Development, 20 (1), 47-55.

Watkins, K. & Marsick, V. (1995). The case for learning. In E. F. Holton (Ed.) Academy of Human Resource Development 1995 Conference Proceedings. Austin, TX: AHRD, 1-1 (7 pages).

Wimbiscus, J. J. (1994). The classification and description of performance improvement scholars: A comprehensive view of human resource development. St. Paul, MN: University of Minnesota.

Wirth, A. G. (1992). Education and work for the year 2000: Choices we face. San Francisco, CA: Jossey-Bass Inc.

Zemke, R. & Zemke, S. (1995). Adult Learning - what we know for sure? Training, 32 (7), 31-40.

Zuboff, S. (1988). In the age of the smart machine. New York, NY: Basic Books.

APPENDIXES

APPENDIX A

QUESTIONNAIRE

Manager's Training Survey

Questionnaire instructions:

1. The Chief Executive Officer or person in charge of management training should complete the questionnaire.

2. Using the definitions below, please answer all questions

3. Please complete as soon as possible and return in the enclosed postage-paid envelope to: Oklahoma Department of Vocational & Technical Education, 1500 West Seventh Av., Stillwater, OK 74074-4364.

Definition of Managers

Those who are in charge of a function(s), operation(s), or program(s), regardless of whether they have anyone reporting to them or not. **THIS WOULD INCLUDE SUPERVISORS.**

Definition of Management Training

Any Formal training (workshops, seminars, programs, etc., sponsored by the company) that managers receive **EXCEPT ONE-ON-ONE OR ON-THE-JOB TRAINING.**

QUESTIONNAIRE

IDENTIFYING YOUR ORGANIZATION

1. Type of business or industry
- 1. ☐ Manufacturing
- 2. ☐ Banking/Finance/Insurance
- 3. ☐ Transportation/Utilities
- 4. ☐ Business Services
- 5. ☐ Retail Trade
- 6. ☐ Public Administration
- 7. ☐ Health Services
- 8. ☐ Mining/Construction/Agriculture
- 9. ☐ Wholesale Trade
- 10. ☐ Other (Please Specify)

2. Total number of employees:
- 1. ☐ fewer than 50
- 2. ☐ 50 - 99
- 3. ☐ 100 - 249
- 4. ☐ 250 - 499
- 5. ☐ 500 - 999
- 6. ☐ 1,000 or more

3. How many employees meet the manager definition? #_____

4. Does your organization budget funds for Management training?
- 1. ☐ Yes
- 2. ☐ No

DELIVERY OF TRAINING
(Training of Managers/Supervisors)

5. Does your organization have a staff member who administers or coordinates **management** training?
- 1. ☐ Yes
- 2. ☐ No
- 3. Person's Title _____

6. If your organization does have a coordinator, is the training his/hers **primary** responsibility?
- 1. ☐ Yes
- 2. ☐ No
- 3. (S)He reports to _____
  (person's title)

7. How are **managers** being trained? (Check **all** that apply.)
- 1. ☐ In-house, company developed and presented training programs
- 2. ☐ In-house, private firm developed and presented training programs
- 3. ☐ Off-site, company developed and presented training programs
- 4. ☐ Off-site, private firm developed and presented training programs
- 5. ☐ Training delivered by a college/university
- 6. ☐ Training delivered by a vocational/technical school
- 7. ☐ Other (please specify)_____

AMOUNT OF TRAINING YOUR ORGANIZATION DOES (Training of Managers/Supervisors)

8. What percent of **managers** received training this past year?_____%

9. How much was spent training **managers** this past year (INCLUDE consultant, workshop, film, supply, travel, etc. costs; EXCLUDE training staff or participant salaries and hardware costs.)
   1. ☐ less than $2,000   4. ☐ $10,000 -19,999
   2. ☐ $2,000 - $4,999   5. ☐ $20,000 or more
   3. ☐ $5,000 - $9,999

10. How many **total** hours did your organizations **managers** spend in training this past year?
    _____ hours

11. Do you feel your **managers** receive adequate training?
    1. ☐ Inadequate
    2. ☐ Fairly Adequate
    3. ☐ Very Adequate

DETERMINING YOUR MANAGERS TRAINING NEEDS (Manager/Supervisor Training Needs)

12. **Do you know what your managers'** training needs are? (Circle the number that best describes.)

Yes		Somewhat		No
5	4	3	2	1

13. Has a needs assessment been performed in your company within the past three years to determine **managers'** training needs?
    1. ☐ Yes   3. ☐ Don't Know
    2. ☐ No

14. Which criteria are used to determine **manager** training needs? Place check (✓) in the appropriate space.

Criteria Used	Frequently	Some	Not at all
1. Need for performance improvement	☐	☐	☐
2. Manager requests	☐	☐	☐
3. New technology requirements	☐	☐	☐
4. New hire required	☐	☐	☐
5. Other (please specify)	☐	☐	☐

15. Who determines which **managers** receive training? Check (✓) **all** that apply.
    1. ☐ Chief Executive officer
    2. ☐ Personnel Department
    3. ☐ Immediate supervisors
    4. ☐ Manager himself/herself
    5. ☐ Other (please specify) _____

16. What interferes with your **managers** receiving training? Place a check (✓) in the appropriate space.

	Frequently	Some	Not at all
1. Time it takes to train	☐	☐	☐
2. Cost of training	☐	☐	☐
3. Location of training	☐	☐	☐
4. Unavailability of training	☐	☐	☐
5. No time to plan training	☐	☐	☐
6. No staff to offer training	☐	☐	☐
7. Manager unwillingness	☐	☐	☐
8. No one to coordinate training	☐	☐	☐
9. Other (please specify) _____	☐	☐	☐

17. Do you anticipate any new technology or changes in your organization that would affect managers' training needs in the next one to three years?   1. ☐ Yes   2. ☐ No

18. If yes, please specify what you think these changes will be. Specifically, in what new technologies will your managers need training?_____

YOUR TRAINING PREFERENCES FOR MANAGERS/SUPERVISORS

19. Which of the following training would you like to offer or continue to offer your **managers**? Check
(✓) all that apply.

Management Leadership:
❑ Setting priorities
❑ Planning/Decision-making
❑ Delegating
❑ Time management
❑ Financial/Budgeting
❑ Staffing
❑ Performance appraisal
❑ Legal regulations

Marketing:
❑ Product/Service quality
❑ Product development
❑ Sales

Company-Specific:
❑ Policies and Procedures

Personal:
❑ Customer relations
❑ Employees relations
❑ Interpersonal communication
❑ Written communication
❑ Conducting meetings
❑ Motivation

Systems Training:
❑ Computer operation
❑ Accounting
❑ Inventory
❑ Record keeping

Other: (specify)
❑ _____
❑ _____

20. Rank the following methods and sources you would choose to satisfy **managers'** training needs.
Indicate your preferences by ranking the first preference #1. (Refer to question 19 for examples
of training types listed below.)

Type of Training   Method of Training (Part A, question 20)

(Rank 1 - 4 in each row for each type of training. Please place a number in each blank)

	Self-paced or Self-instruction (books)	Computer-Assisted	Packaged (Video/Audio)	Classroom (Lecture/Discussion)
➢Management/ Leadership	_____	_____	_____	_____
➢Marketing	_____	_____	_____	_____
➢Company Specific	_____	_____	_____	_____
➢Personal	_____	_____	_____	_____
➢Systems	_____	_____	_____	_____

Type of Training   Source of Training (Part B, question 20)

(Rank 1 - 5 in each row for each type of training. Please place a number in each blank)

	Area Vo-Tech School	University/ College	Your Company (In-House)	Private Consulting/ Training Firm	Other: (Specify) _____
➢Management/ Leadership	_____	_____	_____	_____	_____
➢Marketing	_____	_____	_____	_____	_____
➢Company Specific	_____	_____	_____	_____	_____
➢Personal	_____	_____	_____	_____	_____
➢Systems	_____	_____	_____	_____	_____

EVALUATING YOUR TRAINING OF MANAGERS/SUPERVISORS

21. a. Does your organization evaluate **manager** training?   **b.** If yes, is the evaluation:
    1. ☐ Yes   1. ☐ Formal
    2. ☐ No   2. ☐ Informal

22. Has your organization offered or does it presently offer the listed training for your **managers**? What benefit do you feel your organization received from the training? Respond by checking (✓) the appropriate spaces.

Type Training	When Offered			Type of Benefit Received		
	Past	Present	Never	Tangible	Intangible	None
Management Leadership:						
Setting priorities	☐	☐	☐	☐	☐	☐
Planning/Decision making	☐	☐	☐	☐	☐	☐
Delegating	☐	☐	☐	☐	☐	☐
Time management	☐	☐	☐	☐	☐	☐
Financial management	☐	☐	☐	☐	☐	☐
Staffing	☐	☐	☐	☐	☐	☐
Performance appraisal	☐	☐	☐	☐	☐	☐
Legal regulations	☐	☐	☐	☐	☐	☐
Marketing:						
Product/Service quality	☐	☐	☐	☐	☐	☐
Product development	☐	☐	☐	☐	☐	☐
Sales	☐	☐	☐	☐	☐	☐
Company-Specific						
Policies and Procedures	☐	☐	☐	☐	☐	☐
Personal						
Customer relations	☐	☐	☐	☐	☐	☐
Employee relations	☐	☐	☐	☐	☐	☐
Interpersonal communication	☐	☐	☐	☐	☐	☐
Written communication	☐	☐	☐	☐	☐	☐
Conducting meetings	☐	☐	☐	☐	☐	☐
Motivation	☐	☐	☐	☐	☐	☐
Systems Training						
Computer Operation	☐	☐	☐	☐	☐	☐
Accounting	☐	☐	☐	☐	☐	☐
Inventory	☐	☐	☐	☐	☐	☐
Record Keeping	☐	☐	☐	☐	☐	☐
Other (specify)						
_____	☐	☐	☐	☐	☐	☐
_____	☐	☐	☐	☐	☐	☐

NOTE: If you wish to receive a copy of the research, please include your business card with the returned questionnaire.

APPENDIX B

COVER LETTER FOR INITIAL QUESTIONNAIRE

FIRST MAILING

votech
OKLAHOMA DEPARTMENT
OF VOCATIONAL
AND TECHNICAL EDUCATION

April 1, 1998

[Recipient]
[Title]
[Company Name]
[Address]
[City],[State], [Zip]

Dear [Recipient]:

As a participant in the Training for Industry Programs (TIP), you understand that better trained managers and employees do increase organizational productivity.

We are conducting a survey of training preferences concerning type, source, and method of delivery for managers and supervisors. The purpose of this research is to profile the training currently taking place and to assess training preferences in organizations in the state of Oklahoma. Would you assist us in this project and, in turn, provide yourself with information that will help you in your training efforts?

The results of the study will be used by the Oklahoma Department of Vocational & Technical Education to assist organizations like yours in their training efforts. In addition, the results will be used in a doctoral study analyzing these specific needs. You may receive a summary report of the research results, if you desire.

Please complete the enclosed questionnaire (it will take only 10-15 minutes) and return it in the pre-addressed, postage paid envelope by 4/24/98. The information will be kept strictly confidential and reported only in the aggregate with neither participants nor their organizations identified in the data presentation. A coding system will be used for follow-up purposes only and will be used only by the researchers. If you have any questions concerning this research, you may contact any of the researchers or Gay Clarkson, the Oklahoma State University Institutional Review Board Executive Secretary at 305 Whitehurst, OSU, Stillwater, OK 74078, phone (405) 744-5700.

Again, thank you for taking the time to provide this valuable information.

Sincerely,

Dr. Larry Keen   Dale E. Kunneman, Doctoral Candidate
Oklahoma Dept. of Vocational Tech. Ed.   Meridian Technology Center
1500 West Seventh Av.   1312 South Sangre Road
Stillwater, OK 74074-4364   Stillwater, OK 74074-1899
(405) 377-2000   (405) 377-3333 ext. 232

Enclosure

1500 West Seventh Avenue
Stillwater, OK 74074-4364
(405) 377-2000

APPENDIX C

COVER LETTER FOR SECOND MAILING

OF NONRESPONDENTS

votech
OKLAHOMA DEPARTMENT
OF VOCATIONAL
AND TECHNICAL EDUCATION

April 28, 1998

[Recipient]
[Title]
[Company Name]
[Address]
[City],[State], [Zip]

Dear [Recipient]:

Last month we mailed a Management Training Survey questionnaire to the organizations who had participated in the (TIP) Training for Industry Program in Oklahoma. Your organization was on the participant list. The rush of the spring months affected the number of questionnaires returned, so we are making a second request.

The information collected from the survey will be useful to those who desire to plan management training. The Oklahoma Department of Vocational & Technical Education plans to use the data to assist organizations like yours in their management training efforts. The information from the questionnaire will be kept strictly confidential and reported only in the aggregate with neither participants nor their organizations identified in the data presentation.

In order for the information to be useful, we need at least a 40 percent return of the questionnaires. Please take a few minutes to complete the questionnaire (it will take only 10-15 minutes) and return it in the pre-addressed, postage paid envelope. If you have any questions concerning this research, you may contact any of the researchers at the below numbers.

Again, thank you for taking the time to provide this valuable information.

Sincerely,

Dr. Larry Keen   Dale E. Kunneman, Doctoral Candidate
Oklahoma Dept. of Vocational Tech. Ed.   Meridian Technology Center
1500 West Seventh Av.   1312 South Sangre Road
Stillwater, OK 74074-4364   Stillwater, OK 74074-1899
(405) 377-2000   (405) 377-3333 ext. 232

Enclosure

1500 West Seventh Avenue
Stillwater, OK   74074-4364
(405) 377-2000

APPENDIX D

INSTITUTIONAL REVIEW BOARD

APPROVAL FORM

OKLAHOMA STATE UNIVERSITY
INSTITUTIONAL REVIEW BOARD
HUMAN SUBJECTS REVIEW

Date: February 11, 1998   **IRB #: AG-98-028-A**

**Proposal Title: MANAGEMENT TRAINING ACTIVITIES AND TRAINING NEEDS WITHIN
BUSINESS AND INDUSTRY IN OKLAHOMA**

Principal Investigator(s): James Key, Dale Kunneman

Reviewed and Processed as: Modification

Approval Status Recommended by Reviewer(s): Approved

ALL APPROVALS MAY BE SUBJECT TO REVIEW BY FULL INSTITUTIONAL REVIEW BOARD AT
NEXT MEETING, AS WELL AS ARE SUBJECT TO MONITORING AT ANY TIME DURING THE
APPROVAL PERIOD.
APPROVAL STATUS PERIOD VALID FOR DATA COLLECTION FOR A ONE CALENDAR YEAR
PERIOD AFTER WHICH A CONTINUATION OR RENEWAL REQUEST IS REQUIRED TO BE
SUBMITTED FOR BOARD APPROVAL.
ANY MODIFICATIONS TO APPROVED PROJECT MUST ALSO BE SUBMITTED FOR APPROVAL.

Comments, Modifications/Conditions for Approval or Disapproval are as follows:

Signature: _____   Date: March 17, 1998

Chair of Institutional Review Board
cc: Dale Kunneman

VITA ν

DALE EDWARD KUNNEMAN

Candidate for the Degree of

Doctor of Philosophy

Thesis: MANAGEMENT TRAINING ACTIVITIES AND TRAINING NEEDS WITHIN SELECTED BUSINESS AND INDUSTRY ORGANIZATION IN OKLAHOMA

Major Field: Agricultural Education

Biographical:

Personal Data: Born in Kingfisher, Oklahoma, September 12, 1970 the son of Glenn and Carol Kunneman.

Education: Graduated from Kingfisher High School, Kingfisher, Oklahoma, in May 1988; received Bachelor of Science degree in Agricultural Economics from Oklahoma State University in December 1992; received the Master of Science degree at Oklahoma State University, Stillwater, Oklahoma, in December 1995, completed requirements for the Doctor of Philosophy degree at Oklahoma State University in December, 1998.

Professional Experience: Regional Sales and Marketing Specialist, Farmland Industries, Kansas City, Missouri, January 1993 - May 1994; Management Services Associate, Meridian Technology Center, Stillwater, Oklahoma, June 1994 - January, 1997; Coordinator, Management/Technical Services, Meridian Technology Center, Stillwater, Oklahoma, January, 1997-July, 1998; Assistant Director, Business and Industry Training, Meridian Technology Center, Stillwater, Oklahoma, July, 1998-Present.

Professional Organizations: Oklahoma Vocational Association, American Vocational Association, Association of Psychological Type, American Society of Training and Development, Academy of Human Resource Development, American Society for Quality.