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Seminar in Organizational Relations

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SEMINAR IN ORGANIZATIONAL RELATIONS

By

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Graduate School of Loyola University
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requirements for the degree of
Master of Science in Industrial Relations

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APPROVAL SHEET

The thesis submitted by William Edward Bright
has been read and approved by three (3) members of the
faculty of the Institute of Industrial Relations.

The final copies have been examined by the
director of the thesis and the signature which appears
below verifies the fact that any necessary changes have
been incorporated and that the thesis is now given final
approval with reference to content, form and mechanical
accuracy.

The thesis is therefore accepted in partial
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CHAPTER I

BACKGROUND

AN EVALUATION OF A 20-HOUR MANAGEMENT SEMINAR
ON INTERNAL ORGANIZATIONAL RELATIONS

A. Importance of Subject

    The importance of intra-company management seminars
is increasing for a number of reasons. Among these are:
the growing complexity of the business organization, ever
greater technical specialization, the expanding use of
quantitative techniques in decision making, the increas-
ing educational, cultural, and social sophistication of
the workforce. Also, the business organization can no
longer stand apart from its environment as a purely eco-
nomic entity. Instead it must, to an ever greater
extent, play a citizen's role in the socio-political
environment in which it exists. To lead the modern busi-
ness organization a manager must be skilled in a growing
number of non-economic areas. And among the more impor-
tant of these is the area of interpersonal relationships,
which the subject Seminar is designed to treat. Its
title, "Seminar in Organizational Relations," was chosen

as a non-threatening way of indicating its subject in the view of the typical production-oriented business manager in the company sponsoring the Seminar.[1]

B. Purpose of Thesis

The purpose of this thesis shall be to examine the objectives, content, methodology, and impact of the subject Seminar. Through detailed study, it is hoped to estimate the relative effectiveness of the Seminar components and thus illumine how it may be improved. It may also be possible to do some qualified generalizing regarding the impact of the whole Seminar upon its participants. Further, there may be some carry-over of experience with various Seminar content units and techniques into their application in related management development media. For example, the Seminar's use of attendee oral reports on reference study material is a device that could be applied beneficially in a variety of educational projects for managers.

C. Methodology

The central problem selected for the thesis is the

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[1]The term "Seminar" as initially capitalized will refer throughout the thesis to the Seminar in Organizational Relations.

nature, impact, and implications for related developmental media of the Seminar. It was determined to fall in the category of descriptive research design.

Included among the major hypotheses to be tested were:

1. That the Seminar provided a worthwhile developmental experience from the perspective of its participants and their work associates.

2. That the subject content and instructional methods of the Seminar were beneficial to participants in their regular work.

3. That the Seminar comprised a developmental medium widely used among leading American companies.

4. That, in general, the Seminar achieved to a reasonable degree the goals established for it.

5. That the substantive and methodological content of the Seminar would have application potential in related media of personnel development.

The approach used was to search out all of the available Seminar materials--including outlines, selection materials, evaluation records, career data for participants, specimen transcripts of Seminar discussions, etc.-- to analyze these and arrange them in a sequence and manner designed to make them intelligible, illumine their import, and permit relating them to the similar developmental activities of other organizations.

It was specified that to the extent possible the data would be both specific and factual; but it was recognized that evaluation of such media is necessarily value oriented and subjective to a considerable degree. Evaluative opinion was to be reflected with minimum bias in its condensation and reporting, wherever possible recorded transcripts and other specimen materials of Seminar segments were to be used in an effort to minimize distortions.

It was also part of the research plan to conduct a survey of related developmental seminars provided by a representative sample of the larger and more successful corporations in the United States.

The presentation of findings was to follow a familiar pattern, breaking the thesis content down into

traditional elements in the description of an educative project.

And a final thesis section was to identify conclusions regarding the project which related to the hypotheses earlier established.

NOTE: A review of the literature revealed no article or other material which even approximately paralled the content of this thesis.

G L O S S A R Y

Checklist

behavior of groups . . .   the study of interpersonal relation-
ships within a group as these affect
the accomplishment of the group's
objectives and of the relationships
among groups as these affect the
objectives of an organization.

business ethics . . . . .   the study of how to establish rela-
tive weights for economic and non-
economic elements in the operation
of a business, especially when these
are in conflict.

communications . . . . .   the process, both verbal and non-
verbal, by which two or more persons
transmit and receive meaningful sig-
nals.

decision making . . . . .   a process like that of problem solv-
ing except that it usually involves
courses of action rather than solu-
tions and implies the accountability
and authority to see that the course
of action decided upon is carried
out.

department . . . .   a term generally used to designate a
staff group with accountability for
a function or complex thereof.

department head . . . . .   usually a staff as opposed to a line
manager and accountable for one or
more specialized functions of the
company.

division . . . .   a major segment of the organization
whether defined geographically or
functionally.

executive . . . . a manager who is an officer of his company or who reports directly to its head.

first-line supervisor . . one who is directly responsible for the work of employees who themselves are not responsible for the work of others.

function . . . . a major segment of the business defined in terms of the service or complex of services it contributes to the operation of the company; e.g., Marketing or Industrial Relations.

functional (or staff)
  specialist . . . . . . a person, usually professionally trained, who is accountable for a special function or part-function of the company's operation and for whom this accountability outweighs any supervisory responsibilities he may also have.

human relations . . . . . the process by which people relate to each other individually or in groups.

in-company . . . . a term used to indicate that an activity occurs under the direct sponsorship and administration of the company.

integrated company . . . one that directly carries on all of the major functions related to accomplishing its organizational objectives.

line . . . . a term used to designate employees whose primary accountability is for the whole work performance of other employees.

live-in . . . . a term used to describe a course or seminar where attendees spend two or more consecutive days and inhabit special lodgings on or near the seminar premises while in attendance.

management development . personnel development limited to managers and prospective managers in its application.

manager . . . . one who is accountable for the successful accomplishment of a significant function or geographic area, or some combination of these elements.

middle manager . . . . . a manager who is neither a first- or second-line supervisor nor reports directly to the head of his company.

N/A . . . . a symbol used to indicate a question or survey item does "not apply" to the situation being reported.

organizational relations . . . . . . a term used to cover all of the human elements in directing the work of others.

organizational theory . . a complex of concepts and data having to do with the structural makeup and functioning of groups of people who are serving a significant number of common objectives.

personnel development . . a formal process combining selection, education, career counseling, and evaluation designed to aid in maximizing the effectiveness of an organization's human resources.

problem solving . . . . . a process involving the gathering of data, analysis and definition, a creative search for solutions, selection of one or more appropriate solutions, testing and application and evaluation.

second-line supervisor . one who has first-line supervisors reporting to him.

seminar . . . . an off-the-job educational course involving active participation of the learners in the learning process.

session . . . . one unit or meeting or class in a series together making up a seminar or course.

staff . . . . a term used to designate employees whose primary accountability is for the accomplishment of a specialized function or part function rather than for the supervision of other employees.

CHAPTER II

OVERVIEW

A. Orientation

To intelligibly present a description of the subject Seminar requires a brief overview of the environment in which it was held. Thus, its objectives and make-up can be related to those of the host organization and the sponsoring department.

The host organization was that of a major, integrated petroleum company with sales in excess of $500 million and a manpower count ranging between 8,000 and 10,000 employees during the period 1962 through 1966, when the six Seminars were held. At the corporate headquarters area, where the Seminar convened, there were three main personnel installations: a home office with about 1,200 persons, a nearby research center with about 350, and a refinery with about 600. Of these, approximately 200 were in the middle management echelons from which the participants were chosen. Thus, the 99 persons who participated in the Seminars represented about 50 per cent of the eligible audience. The middle management echelons, as here

constituted, included second, third, and fourth line supervisors, a second line supervisor being one who has other supervisors reporting to him and a fourth line supervisor being typically a staff department head. Also included in this general, middle management category were various technical specialists with few, if any, line re- sponsibilities but having status commensurate with those of the supervisors who participated.

The host company was considered in the oil industry to be a quite conservative one with modest growth aims, heavy emphasis on product quality, generous employee bene- fit plans, and a long-standing policy of promotion from within the organization. In mid-1965 it was merged into a larger competitor but has since been operated as a sepa- rate division of the surviving corporation. Hence, for the purposes of our study, the merger does not present any insurmountable obstacles.

The sponsoring department for the Seminar was the Management Development Department. Its objectives were to aid executive management in the development of managerial talent within the organization. This included preparation of the corporate succession study, counsel regarding ex- ecutive placement, career planning, special recruitment in the exceptional instances where managers were brought

in from outside, relations with educational institutions, research in industry practices bearing on personnel development, and the preparation and presentation of intra-company management seminars. The Department[1] also prepared an annual Management Potential Rating[2] which served as a source of candidates for seminars and other developmental activities.

Among the intra-company seminars sponsored by the Management Development Department were ones on labor relations, report writing, reading improvement, public speaking--treating rather narrow and specific managerial skills. The subject Seminar, however, was the only relatively general purpose course conducted during the period between 1962 and 1966. Presented once or twice each year, depending upon need and schedule commitments, it provided each time a 20-hour workshop in eight weekly or bi-weekly sessions for a group of about 20 middle managers and technical specialists.[3] The Seminar was conducted by the

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[1]The term, "Department" with an initial capital, shall refer throughout the thesis to the Management Development Department.

[2]The Potential Rating required each manager to identify and evaluate all subordinates with better than average career potential. He also estimated the echelon levels to which these subordinates were likely to advance.

[3]Certain minimal exceptions to this statement will be noted in later, more detailed, sections of the thesis.

manager of the Management Development Department. Its

major content emphasis was on three areas: communica-

tions, interpersonal relations, and problem solving.

Among its major instructional techniques were case study

discussion, demonstrations, role playing, attendee re-

ports on reference study material, lectures and quizes.

As a text "The Administrator" case book was used.[1] The

typical Seminar group represented a cross-section of the

division in which it was held or of the company as a

whole. In status of its members the typical group covered

about three managerial echelons; in very few instances,

however, were a manager and his immediate superior per-

mitted to attend the same Seminar. Attendees evaluated

the Seminar in a discussion held in its last session and

in two written evaluations at the beginning and end of a

90-day period following their attendance.. Spot checks

were also made in personal interviews following the

Seminar with the participant's peers and superiors.

B. Objectives of the Seminar

In general, the aim of the Seminar was to improve

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[1]J. C. Glover and R. M. Hower, (4th ed.; Homewood,
Illinois: Richard D. Irwin, Inc., 1965). Earlier editions
were used in the 1962-64 period.

the participant's understanding of the management process and skill in its application, especially in the area of his interpersonal relations. This aim was broken down into the following more specific objectives:

1. To expand the participant's understanding of himself, including similarities and differences between his self-concept and how others perceive him.

2. To increase his understanding of the motivation and behavior of others.

3. To improve his understanding and use of the management process.

4. To increase his communication skills.

5. To improve his skill in exploring and analyzing problems involving people.

6. To improve his decision-making ability.

7. To increase his understanding and skill in interpersonal relations through using the Seminar as a clinical experience in which to experiment--with minimum risks

and penalties--in relating effectively
to others.

8. To increase the knowledge of the parti-
cipant concerning the operations and
personnel of company functions outside
his own department.

CHAPTER III

SELECTION OF SEMINAR PARTICIPANTS

A. The Selection Process

  As indicated in Chapter II, Section A, the Management Development Department conducted annually a Succession Study and a Management Potential Rating for the corporate organization. These studies identified many middle managers and technical specialists who could be considered candidates for the Seminar. Once the Seminar became known to managers generally, they would often designate certain of their subordinates as candidates when contributing data to the two studies. A review of the studies by the Department also turned up persons who, in the Department's judgment, would benefit by attending the Seminar, and their participation was then recommended to their superiors.

  In general, the company's officers and major department heads (those having other department heads reporting to them) decided who would participate in the Seminar. The Department, however, frequently exercised the right to refuse or defer enrollment when a particular group

threatened to grow too unwieldy in size (more than 20
participants), when too great a vertical distribution
would have occurred, when too narrow a cross-section of
the organization might have resulted, or when the enroll-
ment would have placed a man and his immediate superior
in the same group.

The mechanical process of building the typical
Seminar group began with an announcement letter[1] to com-
pany officers and major department heads about 30 days
prior to the scheduled beginning of the Seminar. The
letter identified eight characteristics of the ideal
participant and noted that he should possess at least
six of the eight. They were:

1. Proven ability in his type of work.

2. Better than average career potential.

3. Experience in supervision or in a
technical specialty.

4. Five years' service with the company.

5. Some university education or its
equivalent in self-education.

6. No previous participation in a major
external or in-company educational
seminar or course (20 hours or more)
in the current half year.

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[1]A specimen announcement letter appears in Appendix
I on p. 87.

7. Status reasonably compatible with that of other attendees.

8. An especially strong personal need that the Seminar may be expected to help satisfy. For example, the need to acquire a better understanding of interpersonal relations upon being promoted to a managerial position.

The next step involved personal interviews by the Department manager with all who received the announcement letter. In these interviews the make-up of the Seminar group was worked out within the parameters already established.

When the group was complete an invitation letter[1] was sent to each candidate. Concurrently his immediate superior also notified him orally of his nomination. Sometimes the candidate declined for personal or work conflict reasons, and a replacement was secured through the described process. Most candidates, however, accepted the invitation.

As in most projects of this kind, certain expedient exceptions occurred in the selection process. In the main, however, the process was as described; the participants selected met the qualifications set for them and

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[1]The invitation letter usually contained an advance assignment. A specimen invitation letter appears in Appendix I on p. 88.

the resulting Seminar group achieved the desired dimensions of size and of horizontal and vertical distribution.

Every effort was made by the Department to prevent the use of coercion in securing participants; still in an authoritarian environment coercive pressures, real and imagined, tend always to be present. It is estimated that less than 10 per cent of the attendees participated reluctantly. A favorable element in this experience was the circumstance that the Seminar was held in high regard throughout the organization.

B. Organizational Distribution of Attendees

Attendees of the six Seminars were distributed as follows among the various divisions and departments of the company:

Research	32
Marketing	20
Accounting	9
Refining	7
Industrial Relations	7
Purchasing	4
Engineering	4
Treasury	3
Patent	3
Auditing	3
Systems	2

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Transportation            2
Credit                    2
Exploration & Production  2
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(Total 100)[1]

The apparent over-weighting of Research and Marketing participation occurred as a result of holding two sessions primarily devoted to these divisions of the company. Personnel of the Accounting and Exploration and Producing divisions would have been more numerously represented except for the fact that similar but unreported developmental courses for these two divisions were carried on during the period when the Seminars were being held. In this same period, about 300 supervisory personnel of these two divisions attended somewhat similar courses provided jointly by the Corporate Management Development Department and the staff of the divisions in question. These other courses, however, had significant enough differences from the Seminar to preclude their being combined with the Seminar in the thesis.

C. Career Progress of Attendees

In regard to the subsequent career experience of attendees, the following data is of interest:

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[1]The reason for the total of 100 here and in Chapter VI, while a total of 99 attendees is used in Chapter VIII in reporting the Survey, is that one attendee was reclassified from observer to active participant.

Have received one or more promotions since Seminar	50
No change in position	22
Have left company[1]	20
Have retired	6
Deceased	2

(Total 100)

The data on subsequent career progress of attendees was not reported in Chapter VII for the reason that in the writer's judgment it is more accurately considered an evaluation of the selection process used in securing attendees than of the impact of the Seminar upon attendees. In the situation being studied, it is also distorted by the effects of the merger of the host company into another oil company. While the merger was an uncommonly orderly one, it was bound to cause many dislocations and to result in reorganizations of various kinds. Still, the Seminar, in view of the data reported, can scarcely be assumed to have had a negative career impact upon attendees.

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[1]Many who left the company did so at the time of the merger between Union Oil Company of California and The Pure Oil Company.

CHAPTER IV

CURRICULUM

To describe the subject content of the Seminar requires a different set of categories from that typical of the business curriculum in a university. The Seminar was less theory-centered and less concerned with the traditional subject categories. It was also by design kept flexible enough to permit adapting its content to the changing environment of the host company and to the needs of attendees, in both sequence and degree of coverage.

Thus, instead of classifying readily under subject headings such as Personnel Administration, Industrial Relations, Psychology, Sociology, etc., the Seminar content falls more naturally into the following categories:

1. Motivation
2. Interpersonal Relations
3. Communications
4. Authority Relationships
5. Organizational Change
6. Planning and Decision Making
7. Management Policy

Similarly, the definition of each of these subject matter areas requires a somewhat different approach than is customarily used. It must be remembered that the Seminar was a highly participative educational medium. The attendees learned as much from their active involvment in the Seminar's various processes as from the printed or lecture content it contained. Thus, the subject matter categories can most meaningfully be described in terms of the ideas and topics the Seminar was designed to foster, clarify, or emphasize. In the exposition that follows, these will be grouped under the category headings earlier established.

1. Motivation

    a. The nature and value of non-economic incentives

    b. The relative impact of various leader attitudes upon the performance and personal development of subordinates

    c. Competitive elements in motivation

    d. Psychological and sociological elements in motivation

2. Interpersonal Relations

    a. The impact of individual dif-
ferences

    b. Understanding the concepts of
perceptual psychology

    c. Group dynamics

3. Communications

    a. Oral

    b. Written

    c. The concepts of general seman-
tics in a business framework

    d. Listening as a special area of
emphasis in communication

    e. The nature of group communica-
tions

4. Authority Relationships

    a. Delegation

    b. The problems of intra-group and
organizational loyalties

c.   Authority as a reciprocal process

5.   Organizational Change

a.   Individual and group inertia

b.   The nature and exercise of creativity

c.   The introduction of change

6.   Planning and Decision Making

a.   The nature of the processes involved

b.   The relativity of logic

c.   Setting realistic objectives

d.   The non-factual elements in decision making

7.   Management Policy

a.   Dealing with bureaucratic elements in business organization

b.   Inconsistencies among policy, procedure, and practice

c.   Ethical problems in business

d. The pros and cons of conformity

e. Earning employee commitment to
    organizational goals

In general, the subject content of the Seminar
clustered largely in or near the areas of management process,
communications, and interpersonal relations. As was earlier
noted, however, the emphasis upon a particular area varied
with the estimated needs of the Seminar group. It should also
be noted that much of what was learned in a particular Seminar
group depended upon the experience and intellectual mix pres-
ent in that group. Since the Seminar was heavily discussional
and participative in its instructional approach, its members
learned quite a good deal from each other.

CHAPTER V

INSTRUCTIONAL MATERIALS

A. General Description

In general, the instructional materials of the
Seminar consisted of business case studies selected from
a case book, from various university collections of case
studies, and from the Seminar leader's original collec-
tion of cases, plus short articles on various aspects of
business management and related subjects selected from a
miscellany of published materials and the writings of the
Seminar leader. These were supplemented on occasion by
lectures on management theory, and by a number of short
tests, quizes, and demonstration materials. Materials
found to be effective in use were continued; others were
substituted for in succeeding sessions.

B. Case Studies

Among the cases from the case book,[1] those which
proved most useful were: "Resettling the Highland Tribes,"[2]

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[1] J. D. Glover and R. M. Hower, The Administrator,
(Homewood, Illinois: Richard D. Irwin, Inc., 4th ed., 1963).

[2] Ibid., pp. 213-217.

"Sussex Oil Company,"[1] "Grayson Company,"[2] Lamson Company,"[3] and "John Edwards."[4]

As an example of cases drawn from university collections of business cases, one frequently used was "East-Ohio Communications System."[5] It was effective in developing insights regarding the management process as a result of presenting a business manager who urged his subordinates to practice permissive leadership, but did his own urging in a most non-permissive manner. Many Seminar participants recognized the contrast between the manager's verbal and non-verbal communicating.

"The Case of the Six Lab Conference Leaders" is indicative of the cases drawn from the original collection of the Seminar leader.[6] It was based on an actual experience within the host company.

C. Articles

Articles from various published sources were assigned for study outside the Seminar to augment the attendee's knowledge of the subjects treated in the Seminar. One of

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[1]Ibid., pp. 21-25. [2]Ibid., 347-352.

[3]Ibid., pp. 5-14. [4]Ibid., pp. 319-23.

[5]Copyright 1955, Northwestern University, Evanston, Illinois.

[6]See Appendix II, pp. 98-102.

the most effective of these was "Active Listening," a paper prepared by Rogers and Farson.[1] Derived principally from Rogers' experience in non-directive counseling, it suggests the benefits of actively listening for understanding rather than for criticism or rebuttal of a speaker's message.

One of the articles taken from the writings of the Seminar leader was "The Eddying Concept."[2]

Most often the articles were used as a basis for oral reports by the Seminar attendees. The attendee was asked to report what ideas and opinions were suggested to him by the article to be reported upon. When time permitted, the reporter then led a discussion of the article and his report upon it.

D. Lecture Materials

Lectures by the Seminar leader were used to convey understanding of certain elements of management theory, communications, and the behavioral sciences. These were

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[1]Carl R. Rogers and R. E. Farson, "Active Listening." Reproduced by special permission, the University of Chicago, Industrial Relations Center.

[2]See Appendix II, p. 96.

drawn largely from the works of McGregor,[1] Maslow,[2] Combs and Snygg,[3] Hayakawa,[4] Argyris,[5] and Roethlisberger.[6] An essay by the Seminar leader entitled "Theory 'X' + 'Y' = 'R',"[7] and a Graphic Outline[8] for a lecturette on some of the concepts of phenomenological psychology indicate the nature of the lecture materials.

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[1]Douglas McGregor, The Human Side of Enterprise (New York: McGraw-Hill Book Company, Inc., 1960).

[2]A. H. Maslow, Motivation and Personality (New York: Harper and Brothers, 1954).

[3]A. W. Combs and D. Snygg, Individual Behavior (New York: Harper and Brothers, rev. 1959).

[4]S. I. Hayakawa, Language in Thought and Action (New York: Harcourt and Brace and Company, 1949).

[5]Chris Argyris, Personality and Organization (New York: Harper and Brothers, 1954).

[6]F. J. Roethlisberger, Management and Morale (Cambridge, Mass., Harvard University Press, 19_).

[7]See Appendix II, p. 102.

[8]See Appendix II, p. 107.

E. Tests, Quizes, and Demonstration Materials

As a change of pace and to provide mental stimulation, a number of tests, quizes, and demonstration materials were introduced at appropriate points throughout the Seminar. One of these that had the added value of underlining the nature and difficulty of critical analysis was the "Uncritical Inference Test."[1]

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[1]Copyright 19_, W. V. Haney, Northwestern University, Evanston, Illinois. See Appendix II, p. 92.

CHAPTER VI

PRESENTATION TECHNIQUES

A. Approach

The order for discussing the presentation or instructional techniques used in the Seminar will follow that established in the Seminar Outline.[1] Since certain specimen materials relate more to subject matter, others to techniques, and one to evaluation done within the Seminar, the references in this chapter will be to Appendices II and III. Nonetheless, the concern here shall be with the explanation of the Seminar's major instructional techniques.

B. Seminar Introductions

Under the "Introductions" heading were handled the introduction of attendees, Seminar objectives,[2] and an explanation of some of the methods to be used by the Seminar leader.

The attendees introduced themselves to the group by stating their names, positions, experience backgrounds,

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[1]See Appendix II, Section A, pp. 90-92.

[2]See Chapter I, Section B, pp. 13-15.

and expectations of the course.

Following a brief exposition of the Seminar's objectives, the Seminar leader, in covering methodology, pointed out that the Seminar was a workshop experience involving a great deal of attendee participation. Group discussion of case studies, issues, and attendee reports was mentioned. It was noted that demonstrations, quizes, and lectures were also part of the Seminar pattern. The use of subgroup discussion, skits, role playing, and group analysis of the Seminar process itself was alluded to, as well. In general, the intent was to both forewarn and arouse the interest of the attendees.

Beyond identifying component instructional techniques, the Introduction period in the Seminar also served to explain the basic educational assumptions upon which it was based. These took into account the age and experience of the attendees and the desirability of encouraging them to use the Seminar as a relatively risk-free environment in which to experiment with some of the concepts and skills it was designed to teach.[1]

Essentially, the approach used was what has been

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[1]See Appendix III, Section E, pp. 123 through 125, for a more detailed explanation of the Seminar's educational approach presented to attendees.
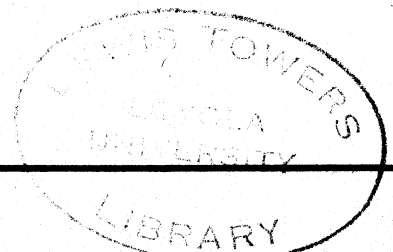
variously described in the literature of educational
methodology as the inquiry method, learning by discovery,
or participative instruction. It provided business case
studies, problem situations, demonstrations, resource
materials, exposition and related media as a basis for
experiment and discussion by the Seminar group. The
primary role of the Seminar leader was to encourage in-
sightful and wide-ranging discussion of the materials
provided.

C. Tests and Quizes

The second instructional technique in the Seminar
Outline order is the Test or Quiz. One of these, the
Uncritical Inference Test,[1] was used early in the Seminar
to sharpen observation and analytic skills and increase
sensitivity to the differences between fact and inference.
The test was presented with a minimal introduction. Most
attendees scored poorly in it--a score of 40 per cent
correct answers being common--and this also helped to
establish acceptance of the need for learning.

Other similarly difficult tests and quizes were used
as motivation and change-of-pace throughout the Seminar.
These included:

1. A test on U.S.A. geography full of little-

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[1]See Appendix II, B, pp. 92-95.

known facts--as, for example, that Purdue
University is located in <u>West</u> Lafayette,
Indiana.

2. A brainteaser quiz including many decep-
tive questions.

D. Demonstrations

A number of demonstrations were employed, involving
the attendees in dealing with some problem critical to
managerial performance. One of these was the Spiral
Response Exercise,[1] emphasizing the nature and importance
of the listening process. Dr. Carl Rogers of the Univer-
sity of Wisconsin has developed a widely respected theory
of "client-centered counselling" which suggested an
interesting group technique.[2] Named the Spiral Response,
it applies in a group setting some of the basic Rogerian
insights regarding communication. The device takes its
name from the fact that it causes direct member-involv-
ment to move in a kind of spiral around the conference
table. Properly used it can dramatically improve com-
munication and accelerate the development of rapport

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[1]See Appendix III, A, pp. 108-112.

[2]Carl R. Rogers, <u>Counselling and Psychotherapy</u>
(Boston: Houghton Mifflin, 1942). Dr. Rogers has since re-
located.

among group members at the beginning of a course or series of meetings.

The Spiral Response requires an advance assignment. Each group member should come to the session prepared to make a two-minute talk on the topic, "An Unresolved Problem I Face in My Work." The term "unresolved" is important; if the problem has already been solved, it may lack interest for the group . . . and challenge for the listener.

Now visualize the typical conference group seated around the table. Start with the person on the leader's left and name the members, A, B, C, etc.

To begin the Spiral Response, Mr. A will state his "problem." He will state it loud enough for all to hear, but he will address his remarks to Mr. B. Mr. B will listen carefully. Then, when Mr. A has finished, Mr. B will play back in his own words the message Mr. A has communicated to him. Mr. B will use his own words (so that more than memory is required), but he will try to avoid omitting, adding or distorting anything in making his playback.

The rest of the group will listen carefully also-- for when the A-B exchange is completed, the group must identify any omissions, additions, or distortions that

have occurred in it. The group will also be asked to compare the emotional temperature of A's original message with that of B's playback; changes in the level of abstraction, for example, may be a clue.

The discussion leader will add his critique to that of the group--making sure that even minor differences in subject content and emotional overtones between the original message and playback are recognized. Only his insistence upon a detailed critique will enable the process to maintain adequate challenge for the group.

Frequently the group will want to wander away from a concern with the accuracy of the communications exchange--to a concern with solving the problem Mr. A described. The leader must not allow this to occur. If interest in Mr. A's problem is high, it may be wise to promise the group they can deal with it later on. In any event, the group should be held to critiquing the communications exchanges during the Spiral Response.

When the group and the leader have finished their critique, Mr. A may be asked to give his own appraisal of Mr. B's accuracy in making the playback--and of the thoroughness of the critique.

Then with the first exchange completed, Mr. B now states his own problem to Mr. C. Mr. C plays it back and

the group and leader do their second critique. Mr. B then comments on the accuracy of the playback and critique.

And the process continues in a kind of spiral around the table--with each group member first playing back a neighbor's statement and then stating a problem of his own. Hence, the name, the Spiral Response.

When thoroughly done, the process requires about 10 to 20 minutes of session time for each member of the group. In a series of two-hour discussional meetings it is effective procedure to devote half of each of the first few meetings to the Spiral Response, the other half of each to case study discussion--or whatever other discussion methods are to be employed.

Persons who have engaged in the Spiral Response report (or exhibit) several benefits from its use.

1. It induces greater concentration in listening than most people have previously experienced. Groups frequently report being physically exhausted after an hour of this kind of listening.

2. The group learns much about the communications tendencies of its members. The members' ability to communicate effectively with each other tends to increase

at a faster rate than occurs in open discussion.

3. From the inventory of individual problems cited, the group learns a great deal about the background, interests, and needs of its members.

4. During the critiquing of the various communications exchanges most of the basic human errors in communicating are identified. For example, the listener will rearrange puzzling data in a pattern more satisfying to himself--or omit illogical material--or add interpretive remarks in his playback based on highly personal assumptions he has made while listening.

5. The "listeners" learn how helpful it is to suspend judgment until you understand what a person is trying to tell you--instead of deciding too quickly what is intended and pretending to listen while shaping a reply.

6. The group discovers--or rediscovers--
   how much a person's point of view
   affects what he hears.

7. The group tends to mature as a group
   more quickly than when the Spiral Re-
   sponse is not used. Often a degree of
   cohesiveness and rapport that might
   otherwise be reached in about the
   fourth or fifth meeting can be achieved
   in the second or third session.

8. Strenuously exercising the members'
   listening skills so early in a series
   of meetings may enable them to get more
   out of subsequent sessions.

9. Focusing attention on the process by
   which the group is communicating
   (rather than on the subject matter alone)
   may help members learn from the clinical
   situation in which they find themselves.
   Sometimes what the group learns by study-
   ing the process in which they are engag-
   ed is closely related to the subject
   matter they are studying. In any event,

their analysis of the process will help
them to relate more effectively as mem-
bers of a group and thus facilitate
learning.

E. Attendee Reports

Each meeting of the Seminar, except for the first
one, in the eight-meeting series began with two or more
attendee reports on topics of interest to an industrial
manager.[1] The reports were of three to five minutes dura-
tion and were followed by five to ten minutes of group
discussion led by the reporter. Since the entire group
had studied the material upon which the report was based,
the reporter did not review the material. Instead he
addressed himself to the implications of the material for
the group and to his own personal opinions on the mate-
rial. The reporter gained experience in self-expression
and discussion leading in the process.

Among the subjects used as a basis for attendee
reports were the following essays prepared by the Seminar
leader; the titles are assembled in categories related to
the management process:

_____

[1]See Appendix II, C, pp. 95-98.

MOTIVATION: Never Let Employees Know Where
          They Stand -- Human Nature Abhors A
          Vacuum, Too -- People vs. Puppets --
          Optimist or Pessimist -- When You
          Stretch an Elastic Band -- The Problem
          of Over-Reach -- More Than Money --
          Who Knows What Employees Want? -- Of
          Bread and Hyacinths

INTERPERSONAL RELATIONS: Let's Scrap the
          Golden Rule -- How Do You Define Com-
          mon Sense? -- Can A Group Become Emo-
          tionally Ill? -- A Predilection for
          Absolutes

COMMUNICATIONS: On Seeing Less Darkly --
          The Option That Isn't There -- Upon A
          Different Design -- On Avoiding the
          Use of Should -- Advice is More
          Blessed to Receive -- How to Avoid Ask-
          ing Foolish Questions -- Always Suspect
          the Worst -- The Eddying Concept

AUTHORITY RELATIONSHIPS: There But for the
          Grace of God -- The Three Little Dele-
          gation "D's" -- On the Nature of
          Mutiny -- And Whether Pigs Have Wings --
          Questions the Boss Can't Ask -- Author-
          ity As A Reciprocal Process

ORGANIZATIONAL CHANGE: The Slow Shuffle --
          Holding the Invisible Horses -- Let's
          Be Practical -- Don't Let George Do It --
          When Things Get Back to Normal Again --
          The Reasons It Can't Be Done

PLANNING AND DECISION MAKING: On Doing
          Things By Littles -- The House That
          Logic Builds -- Putting That Other Foot
          Down -- Where Does 3,000 Miles of Walk-
          ing Take You? -- The Hazards of Not
          Wanting Well -- Pace and Stamina Win,
          Not Speed -- On Firing the President --
          The Non-Factual Elements in Decision

MANAGEMENT POLICY: The Day Paris Fell --
Avoid Liberal Arts -- Who's Afraid of
Socialism -- Is Policy the Best
Honesty? -- On Getting Work Done for
Nothing -- The Right Kind of Man
Around Here -- How Disorganized Should
You Get? -- Management by Whim --
Total Commitment -- Theory "X" + "Y" =
"R"

F. Case Study Discussion

In most Seminars, the Introduction to The Adminis-
trator[1] case book was used to acquaint attendees with the
nature of the case study discussion in which they would
be engaging. Also used for the same purpose was certain
related material prepared by the Seminar leader.[2]

One of the more popular methods of participative
instruction, case study discussion, involves the use of
cases drawn from actual experience in the area of the
subject being studied. Whether the case describes situa-
tions in an educational, industrial, or governmental
environment seems to have little effect upon their use-
fulness. Particularly in dealing with subjects like
management policy, orgizational relationships, or com-
munications, case study discussion has proved remarkably

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[1]J. D. Glover and R. M. Hower, The Administrator,
(Homewood, Illinois: Richard D. Erwin, Inc., 4th ed., 1963).
As previously noted, earlier editions were used prior to 1963.

[2]See Appendix III, pp. 119-123, for material pre-
sented to attendees regarding the use of case study discus-
sion.

effective.[1]

The Objectives of Case Study Discussion

Case study discussion as used in the Seminar on Organizational Relations is designed to achieve the following objectives:

1. To improve the ability of a group's members to communicate with each other both in and outside the conference. It focuses the attention of all upon a single situation, set of problems, case of characters, and environment. As they talk with each other about this common subject, the members gradually learn more about what each means by the word-symbols he uses.'

2. To secure exploration of a subject area in which individual judgment and the interpretation of facts are essential to learning.

3. To develop team spirit and cooperative

[1]See Appendix II, D, pp. 98-102, for a specimen case study used in the Seminar.

behavior in a Seminar group. Discussion of a series of case studies tends to meld the conference members into a more effectively coordinated group.

4. To provide exercise in the analysis and handling of complex situations involving several interrelated (and interacting) problems and personalities . . . all relative rather than absolute, all in a state of flux.

5. To provide experience in the treatment of situations in which many of the facts are unknown. The value here, of course, lies in the case's parallel to the situations we face in our every-day work. In the typical real-life situation, we often must act without knowing "all of the facts." If people are involved in a situation, all of the facts can never be known. There is no way to get inside other people's heads.

6. To give the group exercise in dealing with circumstantial versus factual

evidence, with second-hand evidence versus things the member has himself observed first-hand. If, in his regular job, the group member must rely on and work through other people, he needs proficiency in dealing with circumstantial evidence.

7. To provide insight for each member into the minds and personalities of other members of the group.

8. To sharpen each member's skills in listening, self-expression, persuasion--and, occasionally, in debate.

9. To develop awareness of the impact of each member's background, work experience, and personality upon his reactions and behavior in a given situation.

10. To improve each member's respect and tolerance for the viewpoints and judgment of others.

11. To provide--if a series of conferences

takes place--an experience for the
group in how a group changes and
grows during a series of sessions.

12. To illustrate--again in an extended
series of case study conferences--
how various group pressures influence
the behavior of individual members of
the group.

Why a Series of Case Study Discussions
is Most Effective

Fully effective case study discussion seems to re-
quire a series of conferences for several reasons. The
average group, conditioned to conferences on a single
issue or problem, may well be confused at first by the
complexity of the general case study discussion with its
multiplicity of "facts" and issues. They may become
frustrated by their inability to digest the case com-
pletely and work through to a pat solution for what they
consider its most important problem. In fact, such a
problem, if it exists, may never be clearly identified.
And often there will be no single problem that all mem-
bers of the group can agree is the dominant one.

Furthermore, the objectives we listed could be so

lightly treated in a single session, that the group would be unaware of their being approached at all. Thus, the net result of a single conference could simply be to confuse the group, give them an inadequate and "lost" feeling, convince them--in self-defense--that case study discussion is valueless.

Demands upon the Discussion Leader

Another aspect of case study discussion in the subject areas of the Seminar which deserves attention here is the demands it makes upon the leader. These are more severe than is sometimes recognized, especially when one is dealing with a group largely comprised of persons who are adult, widely experienced, and of demonstrated managerial competence. It must be noted that this approach to the leadership of case study discussion does not apply in all situations, with all subject content, or with all kinds of attendees.

The attitudinal environment of instruction is so vital a factor in the success of participative instruction that it deserves particular attention.

How can a leader create this kind of environment? There probably is no way of saying accurately how it is done. Such a climate must be experienced to be understood. Still, there is a theory we can borrow from the

physical sciences that may help to explain our meaning. It suggests a passive way to stimulate the initiative of a group. If it seems to understress the active elements in the leader's role, accept it as an antidote to the traditional emphasis on the all-encompassing accountability of a leader.

Autocratic concepts of leadership frequently tend to limit the effectiveness of the leader who would induce his group members to share accountability for the success of an enterprise. By emphasizing the responsibilities of the leader, such concepts can cause him to over-participate in an undertaking.

Consider, therefore, a concept in leadership that might be called the Vacuum Theory. It suggests that a leader use inaction--as well as action--to accomplish his objectives. It does not relieve him of accountability in any way; nor does it suggest that he abdicate his authority. It does, however, identify certain values in the leader's exercise of prudent restraint.

As in physical matters, nature abhors a vacuum, so in a leadership situation it is unnatural for a vacuum to remain unfilled. Thus, a leader who can resist taking too many leading actions will often find that his group members will assume accountability themselves.

In case study discussion, for example, the leader who, during a lull in the discussion, says nothing will find that his members are less able to tolerate silence than he is. If he is patient--and appears undisturbed--they will eventually yield to the unbearable pressure of silence and begin to talk.

If, on the other hand, the leader fills such a lull with his own comments--or leading questions--the group will tend to relax and let him do all of the work for them. Or they will briefly answer his questions and allow more lulls to occur. This, of course, is the beginning of a vicious cycle that results in a question-and-answer session at best--a lecture at worst. It is not unlike what happens when over-protective parents limit the development of their children. Since most group members do abhor a silence vacuum, however, they will act to prevent it if the leader appears content to let it occur. This sets up a reverse trend in which periods of silence may initially be long, but tend to become shorter as the session progresses--and ultimately to disappear. Thus, the patiently silent--or inactive--leader is often the one who, in the long run, accomplishes most. His strategic inaction impels his followers to become leaders themselves.

As earlier noted, the kind of attendee is an important factor in the use of case study discussion. The Seminar attendees were typically experienced business men in the 30 to 50 age range. Their work and recreational patterns often made a homely analogy between case study and poker meaningful to them. In a sense, they were preconditioned by their experience to find case study discussion both interesting and beneficial.

The analogy referred to served to facilitate their recognition of the values they could expect to find in the discussion of business cases.

It was pointed out to attendees that: Anticipating a group member's reactions to the discussion of a case is like trying to tell you how you would feel in a poker game for stakes ten times as high as any you have ever played for. It is likely that in addition to intellectual exercise, some emotional involvement will occur.

To continue the analogy, it is also difficult in either situation to suggest how you should behave. Your experience, your attitudes, your skill, and the cards you hold . . . must determine your behavior.

In case study discussion, only a few of the facts are ever present--just those the case writer happened to consider significant, or was able to discover.

Still, as in a poker game where you are certain just of the cards in one hand, it is sometimes possible to take action on the basis of useful assumptions that stem from your experience and the few facts at your command.

Thus, as noted earlier, case study discussion cannot be expected to work equally well in all situations, with all subject content, or with all kinds of attendees. In the instructional situation being treated here, the leader had to be thoroughly familiar with the cases to be used. He refrained from imposing his interpretation of them upon the group. Otherwise, the group's learning would have been limited to what the leader had found in the case. And often this was a very small portion of its content, no matter how great his experience with the case.

The leader tried to behave in a manner that would cause the group members to develop their own capabilities in the discussion, instead of making them dependent upon him.

But more important was the self-concept he held--the attitudes with which he approached his conference task.

If the leader had considered himself an expert on

the case, and underestimated the competence of the group, he would have been lost before he began. The discussion would likely have turned into a guessing game in which the group simply played back to the leader's interpretation of the case.

If the leader had taken a firm stand on any issue in the case, the group would have stopped trying to do its own thinking on this issue.

If the leader had picked a fight with a group member, the discussion would have degenerated into bickering at one extreme or non-productive agreement with the leader's viewpoints at the other.

The leader's function was largely to understand-- and help the group understand--the meaning and significance of each comment that was made.

An exception sometimes occurred when the group had become convinced that its leader was non-autocratic, permissive, had confidence in their ability to stand on their own feet and solve their own problems. When this realization was present, they often were able to accept the leader as an almost full-fledged member of the group. When they did thus accept him he was able to serve as a resource person and out of his experience with the case, make an occasional comment on it himself or point out a

fact which had apparently been overlooked.

In order to preserve the group's initiative and interest, however, he tried to avoid ever becoming defensive when the group took issue with his comments. When these were injected at all, the leader's personal comments on the case were presented simply as additional ways of looking at the situation. No claim was made, even by implication, for their superiority to the group's own opinions on the issue in question.

It was no easy trick for the Seminar leader to learn all he had to know about the case before going into Seminar, and still avoid imposing his personal convictions concerning the case upon the group. But he felt that if they were to learn to think for themselves, this had to be done.

In addition to general discussion of a case study, a somewhat more structured pattern of discussion was frequently used. One example of it involved splitting a Seminar group into smaller discussion groups to spend 20 or 30 minutes in identifying major issues in a case. Then the Seminar group reconvened to consider the findings of the small groups. When a consensus regarding the two or three most significant issues had developed, the Seminar group again broke up into smaller groups to shape

courses of action designed to treat these most significant issues.

As a final step, the total group convened once more--this time to discuss the courses of action the small groups had developed. Often the leader used a blackboard or tear chart to help the class keep track of its findings at various stages of the process. This was a more problem-centered approach to case discussion than earlier described. It had the virtue of bringing issues and courses of action into sharper focus. On the other hand, it sometimes resulted in a less thorough exploration of the varied implications in a case than a less structured approach would have secured.

G. Lectures and Lecturettes

The use of the lecture method in the Seminar differed in at least two ways from its use in many other instructional settings. Essentially, both differences derived from the smallness of the Seminar group and the flexibility designed into the Seminar structure. These elements permitted the leader to keep his lectures brief (more lecturettes than otherwise) and highly informal. It also permitted him to vary the places in the Seminar where the lectures were presented so that, to the best of his ability, they were timed to each group's readiness to

receive the concepts to be presented in the lecture.
This appeared to vary widely from group to group, and
while it was impossible to estimate the timing with com-
plete accuracy, this approach did seem to have consider-
able value. And when the timing was right, the lecturer
was rewarded by observing intense absorption and accel-
erated learning on the part of the group.

Sometimes the lectures comprised straight exposi-
tion and on other occasions, they were augmented by hand-
out material or blackboard work.[1]

H. Role Playing

Another instructional technique used in each Seminar
was role playing. There are so many different kinds of
role playing and they are so exhaustively treated in the
literature of Norman Maier of Michigan University,[2] and
others that the best recourse here is to rely upon the
Appendix section of the thesis to convey an understanding
of the particular form of role playing used in the
Seminar.[3]

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[1]See Appendix II, E, pp. 102-106, for examples of
the lecture material used in the Seminar.

[2]Norman Maier. Principles of Human Relations (New
York: John Wiley & Sons, 1952).

[3]See Appendix III, C, pp. 115-119.

More, perhaps, than any other single technique applied, the role playing met a widely mixed response from Seminar members. Some felt it to be the high point of the Seminar experience; others felt it had very little value. This, of course, will be noted in more detail in Chapter VII.

Also treated in Chapter VII, rather than here, will be the technique of the Discussional Summary, since this was part of the attendees' evaluation of the Seminar.

CHAPTER VII

SEMINAR EVALUATION

A. Discussional Summary[1]

In the last meeting of each Seminar, each attendee
identified orally the item(s) he liked most or found most
useful in the entire Seminar experience. He also identi-
fied the item(s) he liked least or found least useful.
Attendees were encouraged to be completely objective in
doing so in order that the whole Seminar group, in each
instance, might benefit from finding how the experience
appeared to the individual attendee. It was also pointed
out that the inventory of "most useful" and "least useful"
items could lead to the improvement of future Seminars.

Essentially, the subject content of the Discussional
Summaries paralleled that of the written evaluations and
will, therefore, be adequately treated in the review of
written evaluations to follow.[2] The chief values of the

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[1]See Appendix IV, Section A, pp. 126-139, for speci-
men Discussional Summary.

[2]See Appendix IV, Section B, Items 3 and 5, pp. 141
and 148, for written examples of the kind of comments made
orally as well.

oral evaluation were: 1) its allowing all attendees to secure a face-to-face impression of the Seminar impact upon each member of the group, and 2) its helping both the Seminar leader and the attendees to interpret the written evaluations when these were received. The Seminar did constantly evolve throughout the five-year period under study; and the attendee evaluations, both oral and written, contributed materially to its improvement. For instance, attempts to make the subject content more practical (directly work-related) and to increase attendee participation continued throughout the period.[1]

B. Written Evaluations

Each of the six Seminars treated herein received two written attendee evaluations, one immediately following attendance and a second, 90 days thereafter.[2] These were anonymous and this fact was emphasized in requesting them of attendees. As totaled for the six Seminars, they indicate a quite favorable impact in terms of attendee reactions. The comparison of the immediate and 90-day

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[1]Table No. 2, pp. 65-66, records just the most frequent responses; other similar evaluation responses indicated more practicality and participation. (Table No. 1 was moved to improve textual sequence.)

[2]See Tables Nos. 3 and 4, pp. 67-68, in relation to evaluation observations in Chapter IV, Section B.

delayed evaluations shows expected regressions in some
cases and unexpected gains in others. Normally the 90-
day delayed evaluation of related training courses in
the writer's experience has shown an almost consistent
decline in values associated by attendees with the
evaluation subject between immediate and delayed valua-
tions. Hence, the item gains in Seminar values as view-
ed by attendees 90 days following the experience may be
assumed to indicate aspects of the Seminar more than
usually strong and lasting in their impact upon atten-
dees.

As shown in Table No. 2, these included items in-
dicating that the Seminar was a sound investment; that
the Seminar subject matter, instruction methods, group
make-up, and idea-sharing opportunities were appreciat-
ed; that the role playing was quite generally unappre-
ciated.

Similarly, the additional trends in attendee
opinions shown in Table No. 2 indicate that attendees
felt the Seminar to be of value for "selected employees"
(in this context, probably, for these, in addition to
supervisors and managers).[1] And this, of course, may
reflect an increasing awareness of attendees--upon

[1]See Table No. 2, p. 65.

return to their regular work--that the Seminar had values

for the technical specialist as well as for supervisors

and managers.   There were, likewise, gains in the opin-

ions that the Seminar should be given entirely during

working hours, that the course should continue unchanged

and that it was among the better courses attended (which

"gain" is more appropriately a "loss" since it is at the

expense of the opinion the Seminar "was the best such

course" attended).

Table No. 3 on page 67 indicates the trend of

selected written evaluation responses throughout the se-

quence of six Seminars.

One other less formal evaluation procedure helped

materially to bring into focus the impact of the Seminar

upon subsequent attendee behavior.   This comprised in-

formal sampling of the opinions of the attendees' work

associates during the six months following attendance.

The manager of Employee Development interviewed assoc-

iates of approximately one-third of the attendees, in-

cluding about equal proportions of superiors and peers

in the interviewing.

While no written tabulation of the interview

results was made and pencil notes on them are no longer

available,[1] the writer's recollection of them is that they did indicate some apparent changes in attendee behavior on the job.

Foremost among these apparent changes were the following:

1. An improvement in the attendee's communicating with his associates.

2. A more favorable attitude toward his work.

3. Increased interest in areas beyond the narrow confines of his immediate assignment.

4. Better relations with members of departments other than his own.

5. More interest (and skill) in helping to solve departmental problems.

6. Greater interest in his work.

7. More attention to collecting pertinent

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[1]These notes were lost or destroyed in the dislocations following the July 1, 1965 merger.

data prior to making a decision.[1]

There were scattered negative responses in the interviews as well, especially on the part of older associates; and these focused largely in the area of the extra workload imposed by the attendee's absence from his regular work and the futility of off-the-job training of whatever kind. The negative comments occurred largely among peers rather than among superiors or subordinates, which may have indicated the presence of some bias. This possibility is heightened by the clear recollection that no such comments originated with respondees who had themselves attended the Seminar.[2]

While it is not possible to relate the written evaluations to the informal sampling of associate reactions, a scatter plotting of the correlation between Immediate and 90-Day Delayed written evaluations is shown in Table No. 4, following. Table No. 4 indicates an approximately linear relationship between immediate and

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[1] In the instance of a few superiors who were interviewed, this was stated and viewed in a negative perspective, e.g., as taking longer to make up one's mind.

[2] Further comment regarding the impact of the Seminar series as a whole will occur in Chapter IX.

delayed evaluation responses for the most frequent responses by evaluation categories. Items falling to the left of the diagonal indicate a decline in volume between the immediate and delayed response. The item numbers refer to those appearing in the table in Appendix IV, pp. 131-133. And it should be noted that the comment indicating the least liked item in the course is an intrinsically negative response. Elevation along the diagonal indicates relative volume of the response.

That an approximately linear relationship exists between the two evaluations argues for the strength and retention of the opinions represented. That most of the points fall to the right of the diagonal may indicate that immediate opinions were reinforced to some extent when the attendee returned to his regular work assignment.

Table No. 2

ATTENDEES' MOST FREQUENT WRITTEN EVALUATION RESPONSES
TOTALS FOR SIX SEMINARS

I t e m	Immediate Evaluation	90-Day Post Evaluation	Gain	Loss
Seminar helped in present job	49	50	1	
Might help in future job	49	47		2
Was indirectly beneficial	45	43		2
Should be available to:				
Selected employees	36	39	3	
All supervisors	39	37		2
Selected supervisors	34	29		5
All managers	43	35		8
Should be given on company time	66	71	5	
Seminar is a sound investment	80	82	2	
Most liked elements of Seminar:				
Subject matter	73	77	4	
Instruction methods	61	62	1	
Resource materials	58	50		8
Case study discussions	75	72		3
Group make-up	63	71	8	
Idea sharing	74	85	9	
Skill of instructor	69	57		12

NOTE: See Appendix IV, pp. 141,148, for complete listing of evaluation items.

I t e m	Immediate Evaluation	90-Day Post Evaluation	Gain	Loss
Least liked elements of Seminar:				
Role playing	25	38	13	
No changes should be made	32	36	4	
Relative rating of Seminar:				
Best such course attended	30	20		10
Among better courses attended	46	56	10	

Table No. 3

TRENDS IN SELECTED WRITTEN EVALUATION ITEMS

(The most frequent response in significant
categories expressed as a percentage of
the total for that item and Seminar.
Immediate and Post combined.)

Evaluation Items	S-1	S-2	S-3	S-4	S-5	S-6
(8) Helped greatly in present work	42	36	24	20	42	46
(25) Seminar a sound investment	93	100	85	78	100	100
(53) Continue Seminar as is	13	46	15	19	77	33*
(63) Seminar among better courses attended**	53	72	53	57	56	71

*An additional 53% wanted the Seminar to be longer.

**An additional 30% indicated the Seminar was the best such course ever attended.

SCATTER PLOT OF MOST FREQUENT EVALUATION RESPONSES
BY EVALUATION CATEGORIES — TOTALS FOR SIX SEMINARS

TABLE #4.
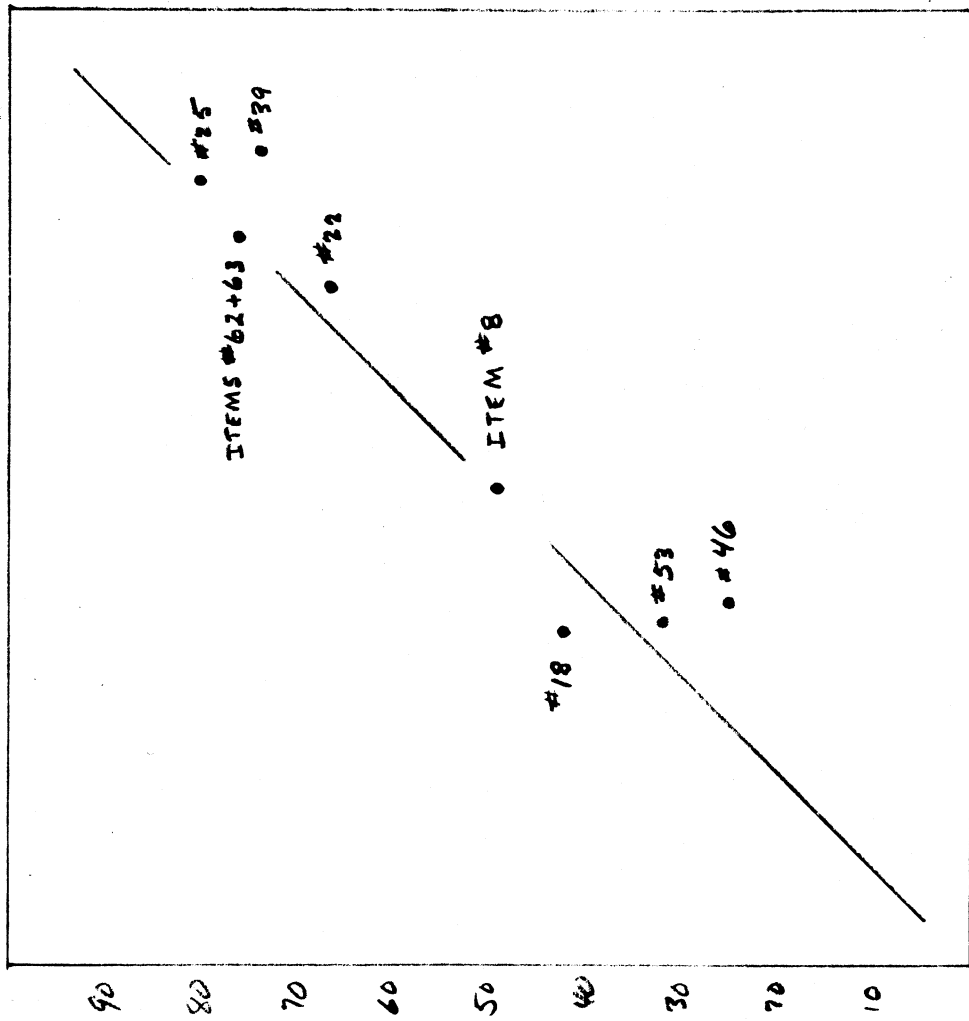
90-DAY DELAYED RESPONSES

IMMEDIATE
EVALUATION
RESPONSES

CHAPTER VIII

SURVEY OF OTHER COMPANY EXPERIENCE WITH
SIMILAR MANAGEMENT SEMINARS

A. The Aims

It was anticipated that the literature regarding in-company managerial development would not relate directly enough to the subject Seminar to answer some of the questions of interest in the thesis; and a review of the literature bore out this expectation. The literature tends to focus either on specific techniques or on broad developmental programs of managerial education, leaving the explicit nature of their component projects relatively unexplored.

Thus, to fill the void between the specific techniques, on one hand, and the generalized developmental effort, on the other hand, a Survey[1] was conducted during March, 1967. The somewhat confidential character of its subject, certain time limitations, the desire to secure

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[1]As capitalized, the term, "Survey," shall refer throughout the chapter to the survey under consideration here.

direct responses from persons relatively high in their corporate hierarchies, and the nature of the questions to be posed in the Survey, militated against the use of a technically complex research design in the Survey project.

The research plan, however, did provide informally for taking into account many of the traditional elements in conduct of such research. The Survey was designed to ask specific questions of interest to the thesis in a manner that would permit relating their answers to the thesis subject. It was planned to reach respondents qualified to make the judgments these answers required. The need to survey a representative sample of companies similar to the Seminar host company was taken into account.

Care was taken in designing the research questionnaire to assure that its aims and intents would be as clear as possible in dealing with a semantically obscure and relatively abstract subject area; also, that it would require minimum time to complete the instrument. While specific data was sought, the form did provide space for entering additional information and explaining problems of individual adaptation in responding to the Survey questions.

The environment in which the questionnaire would typically be executed was also taken into account. Usually the respondents to be reached tend to carry heavy workloads, to work under considerable deadline pressure, and, by the nature of their corporate assignments, to be required to think of many things at the same time.

B. The Design

With all of these considerations in mind, the Survey form as presented in Tables 1-A, B, C, and D, following, was designed. In order to keep the responses focused upon the thesis subject, the questionnaire solicits comparative data on a seminar in the respondent's company which relates as closely as possible to the Seminar on Organizational Relations. The specific areas of interest are defined by describing in the left-hand column of the questionnaire the essential characteristics of the Seminar with which comparisons are sought. These characteristics are grouped in categories familiar to the respondent. A right-hand column is available for the respondent's entering of data regarding a related seminar conducted in his organization. And the form is laid out in a way that aims to suggest ease and quickness of response. Sending the form air mail and providing for its air mail return may have helped both to secure immediate response

and to increase the number of respondents.

C. The Audience

The sample of corporate population used for the
Survey consisted of the members of the National Indus-
trial Conference Board's Council on Education Develop-
ment and Training,[1] augmented by two persons with posi-
tions similar to those of the Council members but sta-
tioned in the petroleum industry. This permitted includ-
ing three other oil companies in the sample of 24 corpor-
ations surveyed. Council members are required by the
Conference Board bylaws to be the top ranking people in
their respective companies in accountability for the
management development function. Further, the Conference
Board strives to achieve a representative cross-section
of the larger and more progressive American corporations
on its councils. Since the formal in-company managerial
development program is a relatively recent arrival upon
the U. S. industrial scene[2] and many smaller companies
are still without formal internal programs of any kind,
the Survey sample chosen was deemed likely to elicit more
significant and useful data.

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[1]National Industrial Conference Board, 945 Third
Avenue, New York, New York 10022.

[2]Most management development departments in Ameri-
can companies reach back no further than to the early 1950's.

Information regarding Conference Board membership is restricted to members, but certain characteristics of the Survey sample can be stated. Six of the manufacturing concerns included rank among the 20 largest U. S. companies. Banking is represented by one of the ten banks with greatest assets. One of the two or three largest merchandising companies is on the list, as is one of the world's largest utilities.[1] Two of the top 15 integrated oil companies are included. Altogether the list contains companies in the following product and service areas: insurance, utilities, chemicals, foods, petroleum, farm implements, soap, banking, textiles, machinery, floor coverings, automobiles, containers, business equipment, electrical products, merchandising, and rubber products. With no more than two or three exceptions, each company represented in the sample is among the top 15 companies in its product or service area, and in a majority of instances, among the top ten.[2]

There are in the list two representatives each of the utilities, chemicals, foods, farm implements, and machinery. As noted earlier, there are three petroleum

[1]Data taken from Reader's Digest Almanac (Pleasant-ville, New York, Reader's Digest Association, Inc., 1966).

[2]Fortune Magazine survey of the 500 largest U. S. companies, July 15, 1966, Volume LXXIV, No. 2, p. 230.

companies represented; and the other product and service areas have a single representative in the sample.

In terms of numbers employed, the companies range in size from about 2,000 employees up to the hundreds of thousands, with a median of approximately 40,000. Using an arbitrary estimate of the ratio between total employees and the number considered eligible for developmental courses such as the Seminar of 40 to one, based on the situation in the host company for the Seminar, this would suggest a total audience for similar courses in the median sample company of approximately 1,000 employees.

D. The Results

Of the 24 companies receiving the Survey questionnaire, 19 replied, four indicating they had no similar courses to report, and 15 supplying information concerning related seminars. The results of the Survey appear in Tables 1-A, B, C, and D, following, with certain explanatory notes entered in the right-hand column of Table 1-D.

In referring earlier to the specific questions to be answered by the research, it was noted that these were spelled out in the items in the left-hand columns of

the Tables wherein the subject Seminar was described--
with the clear intent, of course, of finding whether in
a representative sample of leading U. S. companies simi-
lar developmental projects were concurrently being
carried on; and, if so, in what respects they both re-
sembled and differed from the Seminar. In the main,
these questions would seem to be quite clearly answered.

With an image of the Seminar structure and content
in mind as outlined in the left-hand columns of the
Tables, it may be of interest to describe the typical
other-company course as indicated by the Survey data
appearing in the Tables' right-hand columns.

The typical other-company course would be entitled
"Management Development Seminar." It would be of about
24 hours' duration. Its main subjects would be Human Re-
lations, the Behavior of Groups, Communications, and
Problem Solving. Among its chief instructional techniques
would be printed study material, case study discussion,
lecture, oral attendee reports, demonstration, and role
playing. Most often the course would be conducted by an
internal specialist on management development. The typi-
cal attendee group would be both vertically and horizon-
tally distributed and include professional employees, as
well as managerial ones. It would be evaluated by

means of in-session oral methods, a written attendee evaluation immediately following attendance, and informal sampling of associates' opinions as to whether the course had an impact upon attendee behavior. The overall ratings would range somewhere between Excellent and Better Than Average. Median coverage would be about 375 attendees representing about 50 per cent of the eligible audience in responding companies. The course would have been available during a two-year period and about 22 groups would have attended or be in attendance at present. The typical course would be held during working hours at a general office, for attendees nominated by their superiors, with actual attendance a fairly voluntary matter.

Thus, in a fairly large proportion of instances, it seems likely that courses quite similar to the subject Seminar are being carried on in companies represented by the Survey sample.

Table No. 1-A

March 20, 1967

Limited Survey of Industry Experience with In-Company Management Development
Seminars on the Management Process Emphasizing Interpersonal Relations.
(Companies surveyed- 24)   (Responses-19)   (Completed forms-15)

PURE OIL COMPANY SEMINAR	OTHER COMPANY SEMINAR
NAME: "Seminar on Organizational Relations"	NAME: (AMALGAM) "Management Development Seminar"
DURATION: 20 Hours	DURATION: Range 8 to 150 Median - 24 hours

MAIN SUBJECTS	MAIN SUBJECTS:	
Communications	Yes 11	No 4
Human Relations	Yes 13	No 2
Problem Solving	Yes 9	No 6
Decision Making	Yes 7	No 8
Organization Theory	Yes 6	No 9
Business Ethics	Yes 2	No 13
Behavior of Groups	Yes 12	No 3

OTHER SUBJECTS:

Applied Behavioral Concepts

Management by Objectives

Motivation

MAIN INSTRUCTION TECHNIQUES:	MAIN INSTRUCTION TECHNIQUES:	
Case Study Discussion	Yes 10	No 5
Lecture	Yes 10	No 5
Demonstration	Yes 8	No 7
Printed Study Material	Yes 13	No 2
Oral Reports by Attendees	Yes 9	No 6
Tests and Quizes	Yes 6	No 9
Role Playing	Yes 8	No 7

OTHER TECHNIQUES:

Audio-visual media

Task Force groups

Table No. 1-B   Page Two

PURE OIL COMPANY SEMINAR	OTHER COMPANY SEMINAR

SEMINAR LEADER:
 	
    In-Company specialist on
    Management Development
	SEMINAR LEADER:
	
	Yes **11** No **4**
	OTHER:
	
	    Line and Staff managers,
	    faculty members and consultants

CHARACTERISTICS OF ATTENDEES:
 	
    Each Seminar group represented
    several departments, divisions
    and functions
 	
    Each Seminar group represented
    two or more middle-management
    echelons
 	
    Each Seminar group contained
    managers and functional
    specialists
	CHARACTERISTICS OF ATTENDEES:
	
	Yes **14** No **1**
	
	Yes **11** No **4**
	
	Yes **9** No **6**
	COMMENT: Also -
	Managers and Supervisors with
	superior potential
	Straight-line vertical groups

EVALUATION OF RESULTS:
 	
    Oral evaluation by attendees
    toward close of Seminar
 	
    Annonymous written evaluation
    immediately following Seminar
 	
    Annonymous written evaluation
    90 days or more after Seminar
 	
    Informal sampling of peer,
    superior and subordinates'
    opinions re attendees' changes
    in behavior following Seminar
	EVALUATION OF RESULTS:
	
	Yes **8** No **7**
	
	Yes **9** No **6**
	
	Yes **1** No **14**
	
	Yes **8** No **7**
	
	Also in-seminar peer ratings

Table No. 1-C   Page Three

PURE OIL COMPANY SEMINAR	OTHER COMPANY SEMINAR

EVALUATION FINDINGS:

    NOTE: The "Seminar on Organizational Relations" was generally considered to rate between "Excellent" and "Better than Average"

EVALUATION FINDINGS: (✓)

Excellent	2
Better than Average	6
Average	___
Below Average	___
Poor	___
Very Poor	___

COVERAGE ACHIEVED:

    NOTE: The "Seminar on Organizational Relations" was attended by 99 persons who were about half of the total population considered eligible to attend during a five-year period. Six groups attended.

COVERAGE ACHIEVED: R - 106 to 3,000

Number of Attendees M-375

Proportion this was of total population eligible to attend M-50%

Period of years during which the Seminar was made available R-1 to 7 M-2

Number of Groups M-22.5

MISCELLANEOUS DATA:

    Held at Home Office

    During working hours

    Executives nominated subordinates to attend

    Staff specialist decided final make-up of each group

    Acceptance of invitation to attend was fairly voluntary

    If attendee was absent more than 20% of course, he was dropped from Seminar

    Each Seminar was presented in eight 2-1/2-hour classes

    Classes were held one or two weeks apart

MISCELLANEOUS DATA:

Yes	9	No	6
Yes	14	No	1
Yes	11	No	4
Yes	5	No	10
Yes	10	No	5
Yes	3	No	12
Yes	2	No	13
Yes	5	No	10

Also - a three- to six-day live-in session away from work.

Table No. 1-D   Page Four

PURE OIL COMPANY SEMINAR	OTHER COMPANY SEMINAR

MISCELLANEOUS DATA: (Cont'd) | MISCELLANEOUS DATA: (Cont'd)

Left column:

Two or more hours of home work were required for each class

Right column:

Yes __11__   No __4__

ADDITIONAL COMMENTS:

Notes regarding the interpretation of Survey responses -

1. Each blank item was read as a negative response.

2. N/A responses were read as negative responses.

3. Extra-item responses mentioned are those with highest frequency.

4. Data on a single item was seldom complete enough to determine a mean.

5. Groups ranged from 10 to 35 members with the median between 20 and 25.

6. R = Range

    M = Median

CHAPTER IX

OBSERVATIONS AND CONCLUSIONS

A. Observations and Conclusions

What, then, are the general observations and conclusions that seem warranted on the basis of this study?

1. In general the Seminars, in the opinion of the attendees, their associates and the Seminar leader, constituted a reasonably successful project in the development of managerial and professional personnel. They appear to have contributed to the personal growth and career progress of participants.

2. The process used to select attendees suffered to some extent from the tendency of executives to use the Seminar occasionally to improve the morale of a restive employee regardless of his career potential. Perhaps in future projects of similar nature the impact

of this tendency upon selection can
be reduced.

3. The use of participative instructional
techniques for managerial and profes-
sional attendees was not only favor-
ably received, but appeared to produce
better results than were secured
through non-participative methods.
They are recommended by this experi-
ence for broader use in all develop-
mental projects of related character.

4. The Seminar experience, supported by
the Survey findings that indicate
similar courses in many other large
corporations, would appear to endorse
the benefit of this kind of in-company
management development.

5. Both the Seminar experience and Survey
findings, supported by a great deal of
the literature of personnel develop-
ment and by the related experience of
university graduate programs, appears
to endorse the effectiveness of business

case studies as an educational medium, especially for adult audiences of considerable experience in the case areas.

6. The use of role playing in the Seminar type of setting, while it gives evidence of being both beneficial and widely used, may still require further refinement in an effort to improve its acceptance by adult business audiences. This is an area that deserves continued exploration.

7. Including a broad cross-section of functional specialties and a reasonably diagonal, verticle echelon distribution in the Seminar group appears to have many values. It is a practice that should be extended in future projects of similar nature.

8. The combination of managerial and professional employees (or functional specialists) in a Seminar group has values for both; it improves their understanding of each other and of each others' problems;

and it occasionally awakens unrealized interests, thereby providing career stimulus.

9. The treatment of Business Ethics in courses similar to the subject Seminar is evidently not common; the Seminar experience, however, would recommend its broader coverage.

10. Having attendees make oral reports on brief articles treating significant issues related to the management process proved to be an effective developmental medium. Its wider use is recommended.

11. The conduct of projects like the Seminar provides the specialist in personnel development a valuable opportunity to evaluate the career potential of attendees, provided that he allows for the many differences between the Seminar environment and the work situation.

12. The Seminar environment even on an

in-company basis affords great oppor-

tunity to the attendee to experiment

in a low-risk setting with ideas and

methods it would be much more expen-

sive to test on the job.

B. A Final Comment

The informal research and study of the Seminar in

Organizational Relations which the thesis presents has

cast in a new light the total Seminar experience. The

perspectives gained in going back to accumulate data con-

cerning the Seminar, the searching out and re-evaluation

of objectives, the examination of attendee characteris-

tics, the weighing of impacts for components, as well as

for the whole experience--these, in combination with the

search of the related literature, have created a sharper

image of the Seminar. They have added a degree of

objectivity that should prove invaluable in using the

Seminar experience as a basis for designing more effec-

tive development projects within the host company in the

future.

The literature, while it contained few descriptions

of courses approximately similar to the Seminar in

pattern, was replete with evidence that the aims and

methods of the Seminar are widely endorsed by industry

practice. The supplemental Survey indicated that the basic pattern of the Seminar is also a prevalent one among a number of the country's leading companies. Attendee evaluations presented still another essentially favorable view of the Seminar project.

In retrospect, certain elements of the experience appear to deserve increased attention in related projects of the future. Among these are: augmenting the cross-fertilizing effect of involving cross-section groups in a highly participative environment wherein the risks of trying out creative new approaches to problem solving are lower than in the real work situation; devising more ways in which developmental media may be used to both test and appraise the managerial potential of participants; designing into a seminar format more opportunities for attendees to learn by practice the skills of communications, interpersonal relations and business leadership.

In brief, the Seminar, in the light of the study described in the thesis, would seem to provide some of the foundations upon which to build an increasingly effective program of personnel development.

APPENDIX   I

PARTICIPANT SELECTION MATERIALS

A.   Specimen Announcement Letter

The Seminar in Organizational Relations is now tentatively
scheduled to begin November 5.   It will continue (with an
open week or two) through eight 2-1/2-hour meetings con-
cluding on January 14, 1964.   When the previous Seminar
was held last spring there was insufficient room for all
of the candidates nominated.   Also, additional persons may
have become qualified to attend since that time.

The Seminar in Organizational Relations is a basic course
for managers and technical specialists that is designed to
contribute to the employee's personal development and
career potential.   It stresses the areas of communication
and interpersonal relationships.

Ideally, a candidate for the Seminar in Organizational
Relations should possess at least six of the following
characteristics:

    1.   Proven ability in his type of work.

    2.   Better than average career potential.

    3.   Experience in supervision or in a technical
         specialty.

    4.   Five years' service with the company.

    5.   Some university education or its equivalent
         in self-education.

    6.   No previous participation in a major exter-
         nal or in-company educational seminar or
         course (20 hours or more) in the current
         half year.

7. Status reasonably compatible with that of other attendees.

8. An especially strong personal need that the Seminar may be expected to help satisfy.

Since the group must be limited to approximately 20 persons and the ideal group represents a cross-section of the organization, no more than four candidates from a single department or division should be nominated for the same Seminar.

In order to have the best chance for acceptance, the nominations for the Seminar in Organizational Relations should reach me prior to October 23.

B. Specimen Invitation Letter

The appropriate clearances have now been secured and it is a pleasure to invite you to attend the Seminar in Organizational Relations. It will be held between 9 A.M. and 11:30 A.M., Tuesdays, November 5 through January 14, 1964, in the Auditorium at the General Office. During this time period eight sessions will be so spaced as to make proper allowance for holidays.

About two hours of study will be required each week outside the Tuesday morning sessions. In fact, there is an advance assignment--so come to the first session prepared to give a two-minute talk on the topic, "An unresolved problem in communications or organizational relations I am experiencing." Also, please study the attached article by Carl Rogers.[1]

I shall look forward to meeting with you on November 5.

C. Specimen Roster for the Seminar

1. To indicate horizontal and vertical distribution of a typical group.

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[1]Excerpts from Carl Rogers' paper, "Communication: Its Blocking and Facilitation," originally presented at Northwestern University on October 11, 1951.

O. F. Abbott, Senior Research Scientist
F. S. Alexander, Buyer II
H. F. Bothwell, Manager, Personnel Research
A. H. Duddley, Special Assistant to Director
               of Research
B. H. Firth, Section Supervisor, Research
R. O. Goodwin, Superintendent, Operations I,
               Refining
P. A. Hendley, Regional Co-ordinator of Per-
               sonnel & Development, Market-
               ing
I. L. Jacks, Senior Auditor II
E. A. Longjohn, Training Assistant, Marketing
J. J. Marks, Senior Auditor II
J. A. Morris, Assistant Chief Accountant
R. R. Muncey, Assistant Manager, Transporta-
               tion
H. A. Nicholas, Cost Analyst
K. A. Park, Computer Programmer II
R. F. Rickerson, Assistant Manager, Press
               Relations
R. D. Watson, Technical Specialist
A. C. Watt, Department Manager, Marketing
               Accounting

APPENDIX II

SUBJECT MATTER MATERIALS

A. Specimen Outline for Seminar

Meeting No. 1

Introductions

Attendees
Objectives
Methods

Uncritical Inference Test

Spiral Response

Members' individual problems

Meeting No. 2

Attendee Reports (3 or 4 of 5 minutes each plus
discussion)

Quiz on U. S. A.

Case Study Discussion

Meeting No. 3

Attendee Reports

Demonstration on Multiple Transmission of a
Message

Lecture - Hierarchy of Human Needs

Case Study Discussion

> (Subgroups meet before whole group
> discussion to identify key issues
> in case and afterwards to develop
> specific courses of action.)

Meeting No. 4

Attendee Reports

Lecture - The Impact of Perceptual Psychology
upon Problems of Interpersonal Rela-
tions

Demonstration on Creative Problem Solving

"Nine Dots" or "Sixteen Dots" problem

Case Study Discussion

Meeting No. 5

Attendee Reports

Lecture - Authority as a Reciprocal Process

Brain Teaser Quiz

Case Study Discussion

Meeting No. 6

Attendee Reports

Lecture - What Workers Want Most

Role Playing - "John Kempton" situation

> (3-man teams, each including two players
> and an observer who reports back to whole
> group during critique.)

Meeting No. 7

Attendee Reports

Lecture - "Theory Y"

Case Study Discussion

Meeting No. 8

Attendee Reports

Case Study Discussion

Discussional Summary of Seminar

NOTE: Usually the final meeting was combined with a "graduation" dinner at which one or more officers of the company were guests.

B. Specimen of Tests and Quizes

  1. Uncritical Inference Test[1]

     Instructions

     Read the following little story. Assume that all the information presented in it is definitely accurate and true. Read it carefully because it has ambiguous parts designed to lead you astray. No need to memorize it, though. You can refer back to it whenever you wish.

     Next, read the statements about the story and check each to indicate whether you consider it true, false or "?." "T" means that the statement is definitely true on the basis of the information presented in the story. "F" means that it is definitely false. "?" means that it may be either true or false and that you cannot be certain which on the basis of the information presented in the story. If

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[1]Copyrighted 1955 by William V. Haney; reprints were purchased from Dr. Haney.

any part of a statement is doubtful, make it "?." Answer each statement in turn, and do not go back to change any answer later and don't re-read any statements after you have answered them. This will distort your score.

The Story

A business man had just turned off the lights in the store when a man appeared and demanded money. The owner opened a cash register. The contents of the cash register were scooped up, and the man sped away. A member of the police force was notified promptly.

Statements about the Story

1. A man appeared after the owner
    had turned off his store lights.   T F ?

2. The robber was a man.   T F ?

3. The man did not demand money.   T F ?

4. The man who opened the cash reg-
    ister was the owner.   T F ?

5. The store owner scooped up the
    contents of the cash register
    and ran away.   T F ?

6. Someone opened a cash register.   T F ?

7. After the man who demanded the
    money scooped up the contents
    of the cash register, he ran
    away.   T F ?

8. While the cash register con-
    tained money, the story does
    not state how much.   T F ?

9   The robber demanded money of the
    owner.   T F ?

10. The story concerns a series of
    events in which only three per-
    sons are referred to: the
    owner of the store, a man who
    demanded money, and a member of
    the police force.   T   F   ?

11. The following events were in-
    cluded in the story: someone
    demanded money, a cash register
    was opened, its contents were
    scooped up, and a man dashed
    out of the store.   T   F   ?

Answer Key

1. A man appeared after the owner
   had turned off his store lights.
   (OWNER & BUSINESS MAN MAY NOT BE
   SAME PERSON)   T   F   (?)

2. The robber was a man.   (WHY NOT
   A WOMAN?)   T   F   (?)

3. The man did not demand money.   T   (F)   ?

4. The man who opened the cash reg-
   ister was the owner.   (OWNER MAY
   HAVE BEEN A WOMAN)   T   F   (?)

5. The store owner scooped up the
   contents of the cash register
   and ran away.   (COULD HAVE BEEN
   PROTECTING "CONTENTS")   T   F   (?)

6. Someone opened a cash register.   (T)   F   ?

7. After the man, who demanded the
   money, scooped up the contents
   of the cash register, he ran
   away.   (DID HE SCOOP?)   T   F   (?)

8. While the cash register contain-
   ed money, the story does not
   state how much.   (WHY MONEY?)   T   F   (?)

9. The robber demanded money of the owner. (WHAT ROBBER?)   T   F   (?)

10. The robber opened the cash register. (IF A ROBBER--COULD HAVE RE-OPENED IT)   T   F   (?)

11. After the store lights were turned off a man appeared.   (T)   F   ?

12. The robber did not take the money with him.   T   F   (?)

13. The robber did not demand money of the owner.   T   F   (?)

14. The owner opened a cash register. (VERBATIM)   (T)   F   ?

15. The age of the store owner was not revealed in the story.   (T)   F   ?

16. Taking the contents of the cash register with him, the man ran out of the store. (WHY "OUT?")   T   F   (?)

17. The story concerns a series of events in which only three persons are referred to: the owner of the store, a man who demanded money, and a member of the police force. (WHY ASSUME BUSINESS MAN AND OWNER ARE THE SAME?)   T   F   (?)

18. The following events were included in the story: someone demanded money, a cash register was opened, a man dashed out of the store. (WHY "DASHED." WHY "OUT OF THE STORE"?)   T   (F)   ?

C. Specimen Article Used as a Basis for Attendee Reports

    1. Original essay by the Seminar Leader

The Eddying Concept in Group Discussion

Have you ever heard someone say that a group discussion was dull and repetitious? Perhaps he was simply being accurate. Some discussions may really turn out that way.

There is, however, at least one other possibility to consider. Our critic may have been unperceptive. He may have been deaf--intellectually and emotionally--to much of what other discussion members were feeling, thinking and saying. You may remember the famous comment on an orchestra concert: that it was dull and endlessly repetitious, the way the violin bows all moved in unison and the drummer incessently beat his drum. And someone has said of a famous painting that it looked pretty shoddy up close because of all those careless brush marks.

In a group discussion some members hear only the words that are spoken. Others "hear"--and find of perhaps greater significance--the non-verbal elements of communication. A smile, frown, change in posture or inflection or breathing, the speaker's timing of his comment, his varying pace in speaking, who replies to whom or does not, whose ideas are usually accepted favorably and whose are not . . . these, too, are fascinating aspects of a group discussion. Is it surprising that the insensitive person--who misses most of this--will often find a discussion dull and repetitious?

There is another element in the communication of a discussion group that is frequently misunderstood. It may be described as "The Eddying Concept in Group Discussion."

Most of us, I suspect, take pride in considering ourselves "logical" thinkers. Very likely we tend to believe that we speak the same way. When we use the term "logical" we mean it in a mathematical sense . . . as the theorems of Euclid are "logical." They are so because they arrive most expeditiously at a series of lasting truths.

There is an interesting difference, however,
between Euclid's logic and the "logical think-
ing" upon which we pride ourselves. Euclid
dealt in precise technical terms with carefully
defined lines, angles and figures drawn on a
writing surface. True, these marks had certain
implications regarding similar design in nature;
but Einstein and others have now shown that
Euclid's truths are less true when applied to
space than they seemed on paper. Still there
was a certain intrinsic reliability in Euclid's
theorems that has made them a favorite example
of logical thinking. Our own "logical thinking"
in a discussion, on the other hand, deals most
often in loosely defined--often ambiguous--
terms with a mish-mash of subjective data very
little of which could be described as factual.

A more accurate view of the discussional situa-
tion would make it one in which each member is
using his unique private brand of logic "facts"
that are not facts at all to anyone else, and
words that have different meanings and varying
emotional overtones for other members of the
group. If Euclid had trouble with marks on
paper carefully defined in technical language,
you can see why "logic" is a somewhat complex
matter when applied to group discussion.

Still, some discussion members want a discus-
sion to follow a pattern that satisfies their
own personal concepts of logic as applied to
the subject being discussed. Always from his
own personal perspective this kind of member
wants the discussion to move in an "orderly"
fashion--from where he starts to where he
would like to go.

Instead--for the very reason that individual
members have these highly personal perspectives,
different starting places and destinations in
mind--the discussion tends to follow the eddy-
ing course of a mountain stream. The discus-
sion does double back upon itself occasionally
to enlighten or give talking space to a member
whose interest kindles slowly or whose starting
or end point is far away from those of others
in the group. There are occasional whirlpools
where no forward progress seems to occur,

backwaters where purpose apparently dies.
Sometimes fast as a rapids, sometimes almost
like a pond, the discussion, however, does
always move forward--as inevitably as our
mountain stream.

And while there are consistent elements in it,
a discussion changes as constantly as a stream.
Each is a process in which--casual appearances
to the contrary--no two moments are exactly the
same. Two "identical" comments made by the
same person with the same words and inflection
but occurring at different times--and hence in
a different context--can communicate completely
opposite messages. And, of course, "identical
comments" made by different persons are likely
to have meanings as different as their makers
are.

Anyone aware of the uniqueness of human logic
and able to receive non-verbal communication
will seldom find a discussion dull or repeti-
tious. He will accept as both natural and
desirable the eddying course that most discus-
sion follows.

D.   Specimen Case Study

     1.   An original case based on intra-company experience.

          The Case of The Six Lab Conference Leaders

          The Boxlite Company is a major maker of several
          kinds of packages, containers, and wrapping
          materials. The variety of its products requires
          the use of a large research and development
          staff who comprise a separate division of the
          company, and are quartered in a modern labora-
          tory ten miles from the home office and are
          headed up by a Vice President for Research.
          Employed at the lab are 325 specialists and
          technicians, of whom about 80 are considered to
          be of supervisory status--either because they
          are actually responsible for the work of others
          or because their special skills entitled them
          to equivalent salary.

          About half of the lab employees hold university

degrees for graduate study; almost all of the
80 supervisors (and top specialists) are in
this group.

The Vice President for Research and his chief
administrative aide, the Lab General Manager,
decided to set up a supervisory development
course for the 80 key personnel. These two
men plus the Lab Training Manager and a member
of the home office Personnel Department of
Boxlite together planned a series of 10 two-
hour conferences on the basic elements of a
supervisor's job.

Subject matter for the course was of two types:
case studies in communications and human rela-
tions drawn from industry and the Armed Forces;
and an analysis of a supervisor's responsibili-
ties, duties and qualifications to be developed
in discussion by the students.

It was agreed that the original series of meet-
ings for the first 25 supervisors (including
the top echelon) should be experimental; future
series would be revised on the basis of experi-
ence with the first group.

Six young supervisors in the lab were trained
(by the Lab Training Manager and Personnel staff
man from the home office) to provide non-direc-
tive leadership of the conferences. They showed
so much interest in the course, and flair for
moderating it, that they, with the Lab Training
Manager and Personnel man, evolved into a kind
of steering committee on the project. While the
first series of 10 meetings was being held (at
the rate of two per week), several informal ses-
sions were held with the six conference leaders
to adapt the course to experience while in pro-
cess. Gradually the six leaders seemed to
develop the feeling that the project more or
less belonged to them.

The tenth meeting of the course was devoted to
having the 25 supervisors in attendance evaluate
the project. They made several suggestions for
improving it, including the suggestions that 1)
it be given at a faster pace, 2) it be made more
practical, and 3) it be broadened in scope

either immediately or in related courses to
follow this first unit--to cover all areas of
the supervisor's job.

Then a meeting of the "steering committee" was
held to revise the course before presenting it
to other groups. The Lab General Manager and
Training Manager, and the Personnel man met with
the six conference leaders for this purpose.
The Vice President for Research was unable to
attend this revision session but had sat in as
an observer in about half of the 10 regular
meetings in the course and had kept in touch
with the project through the Lab General Manager
and other key men. The steering committee
worked up a complete new outline for the course,
incorporating its judgment and the suggestions
the 25 attendees had made. The revised course
was to be 18 hours in length and to be considered
just a preliminary course on human problems in
supervision, with subsequent courses to be set up
treating routine administration.

This new outline was then discussed with the Vice
President. He approved of it in general, but
proposed two changes: 1) the number of two-hour
meetings in the series should be cut from 10 to
six, and 2) the subject matter should include
broad industrial cases involving routine admin-
istrative problems in addition to those just on
communications and human relations--cases that
treated more than just the personnel problems of
the supervisor and placed emphasis on more of the
routine aspects of his job.

He said in support of these proposals that if
the broad industrial cases were alternated with
communcations and human relations cases through-
out the course, the students would begin early
in the series to develop perspective on how to
apply the fundamentals of supervision to each
aspect of their own work. He felt this would
accelerate their progress, thus permitting the
use of a shorter course. He pointed out, also,
that the Lab General Manager and several of the
key department heads favored condensing the
course, and beaming it at all the practical,
everyday problems of the supervisor--rather than
just at his problems in dealing with people.

In the judgment of the Lab Training Manager and the Boxlite Personnel man, these proposals made good sense from four viewpoints:

1. The needs and interests of the group to be trained.

2. The regular workload of the trainees during the period in which the course would be given.

3. Their professional understanding of what would promote effective learning in the course.

4. The opinions and desires of the Lab Management group.

Thus they agreed to take up the Vice President's proposals with the "steering committee," and assured him they felt this group would wish to incorporate them in the revised course.

Another meeting of the steering committee was held and the Vice President's two proposals were discussed. The six young conference leaders, who had seemed "on top of the world" emotionally when they completed the revised outline of the course the previous day, now appeared to experience a radical change in attitude toward the project.

One of them stated what seemed to be a consensus of the six.

"These two changes put things in an entirely different light," he said. "They told us this was the most important project in the Lab right now. But if the Vice President--who didn't even attend all the meetings and wasn't in on the revision session at all--is going to step in like this and throw his weight around . . . well, I say it doesn't make much difference how we handle the other groups. Let's cut it to four meetings and use all straight industrial cases. The sooner we get it over with and get back to our regular work, the better for everybody."

The Lab Training Manager and the Boxlite Personnel man continued the discussion of the Vice President's proposals, until all of the young lab supervisors who had served as course leaders had exhaustively expressed their views. At the end of the discussion they felt the consensus of the group to be that the Vice President's proposals should be accepted. But the six leaders were clear in stating their opinion that the course would be less effective on the new basis.

Following this meeting the Lab Training Manager invited the Personnel man to his office to decide what, if any, further action should be taken with respect to revising the course. He said he was uncertain how to proceed.

E. Specimen Lecture Material

1. Lecture on Theory "Y"[1]

2. Graphic outline for lecture on the Impact of Perceptual Psychology upon Problems of Interpersonal Relations.

Theory "X" + "Y" = "R"

In the equation, Theory "X" + "Y" = "R," the "R" represents the realities of managing a business organization; and we shall come back to this later.

Douglas McGregor presents in The Human Side of Enterprise[2] an illuminating analysis of two opposing philosophies of leadership. While admitting that his structuring is arbitrary, Dr. McGregor sees great value in

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[1]Based on material drawn from Douglas McGregor's The Human Side of Enterprise (New York: McGraw-Hill Book Company, Inc., 1960).

[2](McGraw-Hill Book Company, Inc., 1960.)

reducing the many different styles of business leadership to an either-or framework, saying that they tend to classify as either "Theory X" or "Theory Y" in regard to the basic assumptions they make concerning human motivation.

Theory X is the traditional approach to management of an enterprise. It is management by direction and control, in which essential authority resides at the top of the organization and is doled out sparingly under rigid controls. The employee's interests are assumed to be largely in conflict with those of the organization. He is expected to be no more honest, industrious and cooperative than necessary in order to achieve certain short-term, mainly selfish ends. Under an enlightened Theory X manager, the managing process becomes a rather complex form of manipulation, but remains manipulation, nonetheless. Under a benevolent manager, the relationship between superior and subordinate becomes paternalistic. In all of its many varieties, Theory X tends to create dependency on the part of the underling.

Theory Y, on the other hand, is an approach to managing in which the goals and interests of the organization and the employee are integrated to a degree that induces the employee to exercise self-control in voluntary pursuit of organizational objectives. Its psychological underpinnings are similar to the "needs hierarchy" theory of A. H. Maslow.[1] In McGregor's development of the idea, these are couched in six basic assumptions regarding motivation:

1. To work is as natural as to play or rest.

2. When committed to objectives a man will exercise self-direction and self-control in serving them.

---

[1]A. H. Maslow, Motivation and Personality (New York: Harper and Brothers, 1954).

3. Commitment to objectives is a func-
    tion of the rewards associated with
    their achievement.

4. In the right environment a human
    learns not just to accept but to
    seek responsibility.

5. Capacity for imagination, ingenuity
    and creativity are widely distrib-
    uted among employees.

6. Under present industrial conditions
    the potential of the average person
    is only partially realized (or uti-
    lized).

In direct opposition to Theory X, Theory Y has
as its most significant characteristic the ten-
dency to foster self-actualization.

As with many foods, however, some theories be-
come more palatable when taken with a grain of
salt. In McGregor's case the author himself
has supplied the seasoning in an essay written
as he returned to teaching after six years as
President of Antioch College in Ohio.

> . . . Before coming to Antioch . . . .
> . . . .
> I believed, for example, that a leader
> could operate successfully as a kind of
> adviser to his organization. . . . . .
>
> I couldn't have been more wrong. It
> took a couple of years, but I finally
> began to realize that a leader cannot
> avoid the exercise of authority any
> more than he can avoid responsibility
> for what happens to his organization.
> . . . . Moreover, since no impor-
> tant decision ever pleases everyone in
> the organization, he must also absorb
> the displeasure, and sometimes severe
> hostility, of those who would have
> taken a different course. . . . . This
> notion is not in the least inconsistent
> with humane, democratic leadership.
> Good human relations develop out of

strength, not of weakness.[1]

Thus, McGregor's belief is not wholly made up of blacks and whites, but contains much grey matter as well. He would have been the first to endorse the flexibility of his findings in application.

Initially, we said that in the equation Theory "X" + "Y" = "R," the "R" represents reality. In his essay, "On Leadership," McGregor seems to appreciate the difficulty of making his Theory "Y" work outside the covers of a text on the management process. Today's typical corporate environment seems to be an amalgam of "X" and "Y." It contains elements of the structuring and control that characterize Theory "X," but these are by no means all-inclusive. It contains elements of the positive motivation and self-accountability of Theory "Y," but these are by no means all-pervasive. Employees are conformed to company patterns in many cases. But not without exception. In some instances, the dimensions of the job are shaped to the propensities and capabilities of the employee. When the incumbent changes, so do the dimensions of the job.

Thus, the "R," for reality, in a business setting would seem to be full of conflict and contradiction. Why have so many business corporations combining "X" and "Y" been so successful?

Perhaps, instead of defending either theory the students of management would be well advised to look for the most effective blend of the two.

There may be a mixture of "X" and "Y" elements that will prove as practical as the American compromise between private enterprise and socialism in the politico-economic sphere.

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[1]Douglas McGregor, "On Leadership," Antioch Notes, Vol. XXXI, No. 9 (May 1, 1954).

What is your opinion of Theory "Y"? How
would you classify your own philosophy and
practice of leadership? If you had your
"druthers" would you change your orienta-
tion? If so, toward which end of the "X"
and "Y" continuum would you move? Toward
which end of the continuum does American
industry seem to be trending? Why? Is
the trend desirable in your opinion?

SELF IMAGE → IMAGE PROJECTED → IMAGE RECEIVED

REALITY INVOLVES PERCEPTION

FEEDBACK

SELF IMAGE

SELF

THE EXECUTIVE

ANALYSIS

INPUT

OUTPUT

PERCEPTIONS

BLIND SPOTS
DIMNESS
DISTORTION

VERBAL and NON-VERBAL COMMUNICATION

NON-LOGICAL
SEMANTIC
PSYCHOLOGICAL

OTHERS

ANALYSIS

INPUT

OUTPUT

VERBAL and NON-VERBAL COMMUNICATION
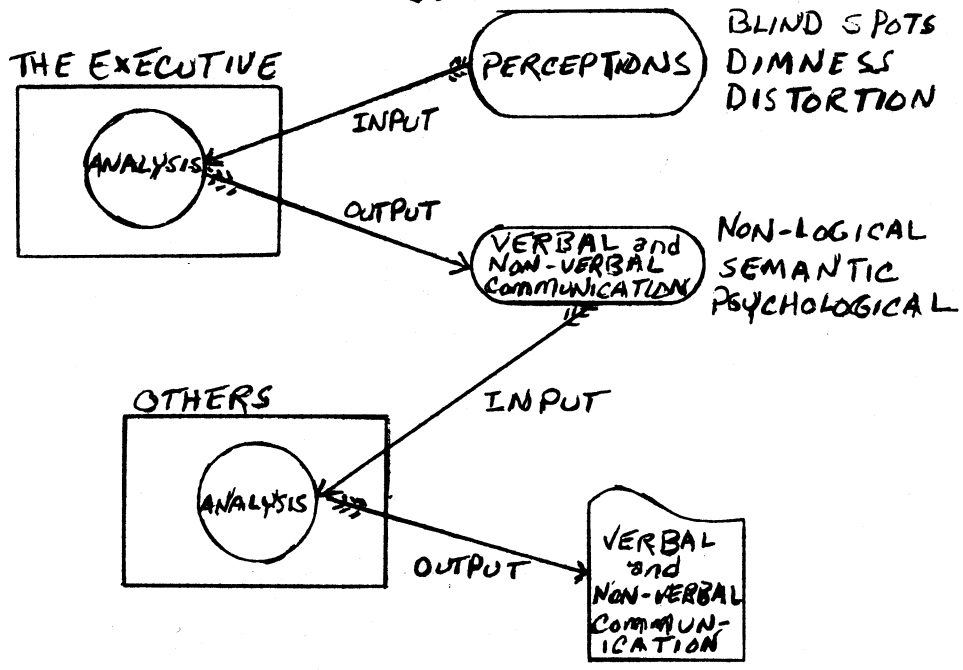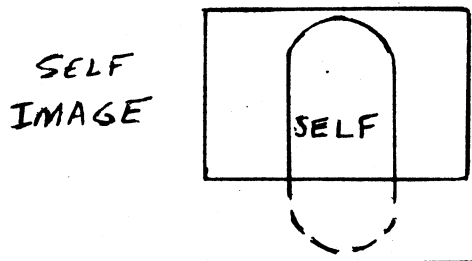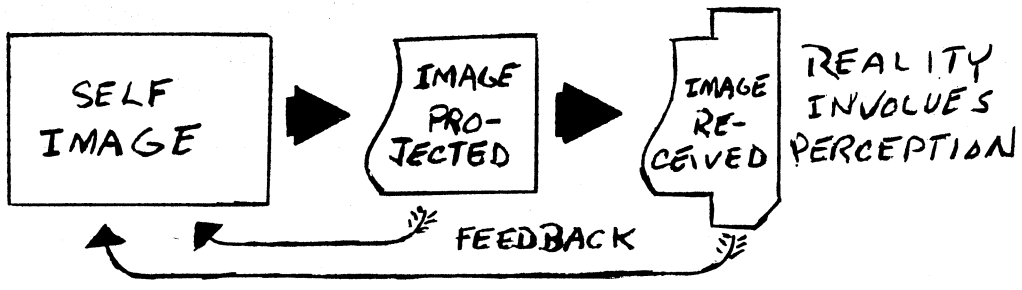
PROBLEMS of
INTERPERSONAL
RELATIONS

(and so forth)

MD 2-14-66

APPENDIX III

SEMINAR TECHNIQUES

A. The Spiral Response Exercise (an application of Carl R.

Rogers' theories regarding communication in the Seminar

group).[1]

  1. An edited transcript of a tape recorded in a

  Seminar session.

  A Specimen Transcript of the Spiral Response

  NOTE: Each member of the Seminar was asked
          to come to this session prepared to
          make a two-minute oral report regard-
          ing a work-related problem in which
          he was currently involved--preferably
          one for which no solution had as yet
          been achieved.

  Discussion
  Leader: Let's begin the Spiral Response
                with Mr. A's statement of a prob-
                lem he is experiencing. Then Mr.
                B will play it back in his own
                words.

  Mr. A: There is a communications problem
                in my Supply Department. We have
                about 20 men--10 here in the
                General Office and 10 more in our
                regional warehouses around the
                country. Frequently there are

---

[1]Based on theories presented in Carl R. Rogers' Coun-
selling and Psychotherapy (Boston: Houghton-Mifflin, 1942).

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manufacturing changes made in the
motors we handle--not major changes,
just small improvements in a parti-
cular part. When this happens the
part number is changed. A bulletin
goes out to the whole company--in-
cluding sales--instructing everybody
to use the new number in ordering
replacements of the part. Then we
get rid of the obsolete parts and
stock only the improved ones.

Our problem is that we invariably
keep on getting orders for the old
part, even as a replacement on newer
models the old part will no longer
fit. Sometimes this goes on for
months after the change has been
announced. When the new and old
parts are completely interchangeable
without any modification kit or
mechanical adjustment, we simply
ship the new parts, even on orders
that come in with the old number.
But often this cannot be done.

How can I get our field people--par-
ticularly our sales people--to order
correctly and avoid all the mix-ups
that otherwise occur?

Mr. B: As I understand it, you have a prob-
lem with the system you use for num-
bering the components of your prod-
ucts. You have a Supply Department
with 20 men in it and your manufac-
turing division makes model changes
that cause confusion in ordering re-
placement parts. Now, we had a
similar problem in my company and
solved it pretty easily. What we
did was to make the adapting kit or
adjusting instructions an integral
part of the package in which the im-
proved part was shipped. That way
we never had any ordering mix-ups no
matter what parts number was used--
either the old or the new.

Various
Group
Members: "Mr. B may have understood Mr. A's
problem, but he gave no real in-
dication whether this was the case.
Instead, he plunged into 'solving'
what he assumed was Mr. A's prob-
lem."

"If Mr. B had taken the 10 field
supply men into account, a better
solution might have been worked out."

"Mr. B failed to 'play back' the
kind of product involved, the seri-
ousness of the problem from a time
standpoint (the mix-ups go on for
months, etc.) and the detailed com-
plications in making the changes--
just to mention a few of the items
his playback omitted."

"That last item--on complications
in the changes--is a key one, I
think. I got the impression that
we were dealing with several dif-
ferent situations as regards the
parts changes. For example--a
straight, simple substitution, a
substitution with a kit of adapting
fittings, a substitution with spe-
cial instructions for making the
change, new parts that would not fit
some of the models now in use, etc.
None of this got into Mr. B's play-
back--or seemed to be accurately
taken account of in the solution he
proposed."

"There was no mention of the sales
force as a special problem area in
the playback either."

Discussion
Leader: Let's consider another angle--"why"
this happened. As a member of our
group following special instruc-
tions, Mr. B started out to play
back Mr. A's message all right--
then got side tracked.

As a supervisor in his regular job,
Mr. B is used to finding solutions
for problems his people bring to
him. This happens several times
every day. What could be more natu-
ral, then, than to do the same thing
--find a solution--when Mr. A made
his problem statement in our Spiral
Response. Even though Mr. B knew he
was really supposed just to play
back the message in his own words--
but keeping his own ideas out of it
--he couldn't resist the tug of the
old habit. So he stopped playing
back Mr. A's message and began help-
ing him solve his problem.

Mr. A, please give us your personal
reaction to what has been going on.

Mr. A:
Well, I guess Mr. B really under-
stood what part of my problem was
. . . but not all of it. At least,
it couldn't be cured just by packag-
ing adaptor kits and instructions
with the altered parts. You see, we
had some old models in use that the
new parts wouldn't fit at all.

Discussion
Leader:
Let me check something before I for-
get it. I thought you said in your
statement that once the new parts
are available you stock only new
parts and destroy the obsolete ones.

Mr. A:
Yes, I guess I did say that. What I
meant was that we stock just the new
parts in our 10 field warehouses and
keep only a special limited stock of
the old parts at the General Office
until the models that use it are all
out of service.

Discussion
Leader:
We have probably gone far enough,
now, with this communications exchange
to see that Mr. B did not fully

grasp the problem before trying to help Mr. A solve it.

NOTE: Now that Mr. A had stated his problem and Mr. B had played it back--and the exchange had been thoroughly critiqued by the group--the spiral would proceed to an exchange in which Mr. B stated a problem that was played back by Mr. C with further critiquing by the group. Thus, the process would move in a spiral around the conference table until Mr. A had played back the statement of the last member to report.

Since this was the first exchange in the spiral, the leader would make no mention of the emotional balance between the original message and the playback. Along about the third exchange he would begin holding the group accountable for this dimension of communication, also.

By "emotional balance" is meant the degree to which the message and the playback are similar in emotional involvement of the speaker--whether pronouns of the same person were used in both instances, the relative degrees of abstraction, similarities and differences in voice and facial expressions, etc.

B. Demonstration on Creative Problem Solving

1. The "Nine Dots" problem[1]

2. The "Sixteen Dots" problem[2]

The Nine Dots in Rows of Three

Our first puzzle is a quite familiar one. Its introduction should include mention that the

---

[1]From an anonymous source.

[2]An original adaptation of the "Nine Dots" problem.

ability to solve it seems to correlate inversely
with the amount of a student's formal education,
and with the amount of administrative experience
and responsibility a person has had.   There
seems to be a positive correlation, on the other
hand, between ability to solve this puzzle and
the extent of an individual's creative flair.
Business managers have typically found it very
difficult to solve in the two minutes usually
allotted; but professional writers and graphic
artists have frequently found it easy.   Young-
sters given the puzzle have sometimes asked why
the puzzle is considered difficult by adults.
One other interesting aspect of this device is
that its solution is hard for some adults to re-
call.   Ten per cent of a group of business mana-
gers may solve the puzzle on a first attempt;
two weeks after they have been shown the solu-
tion, twenty per cent of the group may still
fail to solve the puzzle in two minutes.

Nine dots in rows of three are placed upon a
blackboard or tear chart in this fashion:

Then the group member is instructed to "draw
four straight lines that pass through all the
dots without retracing or removing his pencil
from the paper" on which he has duplicated the
figure shown.   As indicated above, two minutes
is a reasonable time period to allow most
adult groups.

Solution for the Nine Dots in Rows of Three

To solve the puzzle, you have to break out of
the traditional pattern, escape the tendency
to see the figure as a closed one.   The answer
demands an original approach:
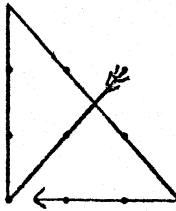
A device like the Nine Dots puzzle can provide
a welcome change of pace when used between two
case study discussions in a seminar. When a
group is bogged down in trying to solve a prob-
lem, the Nine Dots puzzle helps to get them
going again. On many such occasions, its use
has seemed to stimulate both interest and crea-
tivity.

Such devices, of course, should always be pre-
sented in a spirit of fun. Results should be
understressed rather than emphasized--to pro-
tect losers and prevent winners from reading
too much in them. It must be remembered that
no direct relationship exists between the abil-
ity to solve such problems in the artificial
environment of a seminar, and the ability to
perform work in a real-life situation. Even
the comments regarding the apparent correla-
tions of this device to one's formal education
and creativity need to be taken with the pro-
verbial grain of salt. There are many, many
exceptions to every such rule.

The Sixteen Dots puzzle is designed for use
with groups that have seen the Nine Dots
puzzle or would, in the leader's judgment,
find the Sixteen Dots device more interesting.
Everything said about the Nine Dots applies to
this puzzle as well, except, of course, the
substitution of the appropriate new numbers in
the instructions. The group is given two
minutes to draw six straight lines that pass
through all the dots without retracing or
removing pencil from paper.

The pattern is also similar:
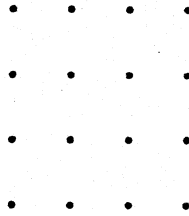
And the solution is generically the same:
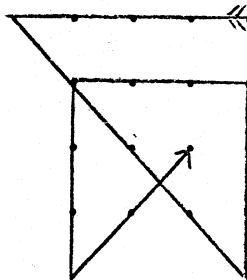
C. Specimen Instructions and Questions for Role Playing Exer-
cise

1. An original role playing situation based on

intracompany experience.

INTERVIEW WITH JOHN KLEMTON

Instructions to Supervisor

You are to assume that John Klemton, age 37,
is one of the regular employees in your 13-
man department. He is an above average
employee, but is now at the top of his salary
range and is two years away from promotion.
He has been with the company 10 years.

You have been asked to reduce your department
salary budget 10% during the coming year as
part of a company-wide cost reduction program.

John Klemton visited your office yesterday
to ask for a raise, stating that he deserves
a merit increase and cannot make ends meet
in his family budget. You asked him to come
back today to discuss the matter.

In checking his personnel card, you have
found that his last merit increase occurred
15 months ago. At the beginning of this
year there was a general cost of living in-
crease of 5% in which Klemton participated.

NOTE: In your own view, you are on excel-
        lent terms with your employees. You
        pride yourself on taking a personal
        interest in their problems, maintain-
        ing good informal communication with
        them and earning their loyalty. Some
        of the younger men in the department
        have received merit increases during
        the past year--where these were
        deserved and could be given without
        bringing the men too close to the top
        of their salary ranges.

Instructions to John Klemton

You are 37 years of age and have been with the
company 10 years, most of this time in your
present job, which you like very much. Your
supervisors have always praised your work--
indicating you are one of their best men.

Yesterday you mentioned needing more money "to
make ends meet" to your supervisor, and
arranged this interview to discuss a raise to-
day.

Your last merit increase occurred 15 months
ago, you did share a 5% cost of living general
increase granted at the beginning of this year.

You don't really need the money very badly.
You have your personal budget under fair con-
trol and are saving a small amount each month.
A more serious problem is that five of your
good friends in the department have had raises

since your last merit increase. You are
not to divulge this information unless
your Department Head succeeds in making
you really <u>want</u> to tell him.

NOTE: You have always been a little
skeptical of your supervisor's
"hail-fellow-well-met" manner.
You have observed that he usu-
ally gets his own way and does
not seem to enjoy being opposed.

Recently your brother-in-law
has been urging you to go into
partnership with him in an in-
surance agency which he has
successfully operated for sev-
eral years. You have about
half decided that you are in a
"blind alley" in your present
work and should probably leave
the organization. On the other
hand, you are not sure how well
you could sell insurance or how
easy it would be to get another
job doing your present kind of
work.

Instructions to Observer

Yours is a silent role.

You are to observe what occurs during the
supervisor's conference with John Klemton.

You will later report to the total group,
covering such items as--

1. The approach to the issue used
by each participant.

2. Impact of the interview upon
John Klemton's morale and pro-
ductivity.

3. Whether the role playing seemed
realistic.

4. Whether the interview uncovered any additional reasons for John Klemton's appeal for a raise.

5. What you would have done differently if you had been playing the supervisor's role yourself. (Please identify and comment on any positions assumed by the "supervisor"--or arguments presented by him--that you feel a representative of management should not use.)

KLEMTON ROLE PLAYING

Questions

- should company "plead poverty" in refusing a wage increase?

- should the 10% reduction be mentioned?

- should company use "cost of living" as an argument?

- especially when company frowns on employee's using budget needs as his plea?

- should a raise (or recommendation for same) be definitely promised?

- should a promotion be promised?

- should supervisor admit he has no authority to give raise?

- if a company pleads poverty during an austerity campaign, what will happen when the company has a good year?

- in fact, when company leaves the individual work and wage contract to introduce other arguments, doesn't this always open the door to extraneous pleas on the employee's part?

- should a manager ever admit he sides with

employee in taking issue with a superior or with company policy?

- should a supervisor ever plead weakness--inability to act when an employee makes a request?

- should a supervisor allow himself to become provoked or offended when an employee is "informal" or "insistent in asking for a raise?

D. Case Study Discussion

Perhaps we should begin by saying what we mean by a case. A case is a set of facts about people in a specific situation. It involves personalities, an environment and behavior of significance and interest to the group. It is a slice of life. Whether it is "factual" or "fictional" makes little difference so long as the "fictional" case is true to life.

Ideally, it describes a situation which is complex, with many interacting human factors. And, again ideally, there are probably no "right" answers to the problems it raises. There may be, however, certain major issues to be identified by the group--and courses of action developed to handle them.

Assuming we have a group and a case study they have studied, what happens next can be stated much more quickly than it occurs. Essentially, all that happens is that

the group discusses the case. There may be all kinds of variations in the way they discuss it. The pages that follow will treat many of these. But, basically, the important thing is for the group members to apply their minds--and tongues--to the synthesizing of data into useful generalizations concerning the subject being discussed. It is a truism, of course, that with most art forms the more complex a process is the simpler it is likely to seem to the uninitiated. This paradox applies in an especially baffling way to case study discussion.

More puzzling to some people is the fact that often the group is not expected to find an "answer," or a set of answers to the problems raised in the case. In fact, in some cases the group cannot find "answers" . . . and there are several good reasons for this.

In the first place, the typical case has been selected or constructed so that many human emotions and attitudes are involved. No single answer, or set of answers, could cover the way a given person may react in a given situation.

Second the case never states all the facts. It couldn't. It is life-like in that respect. Do we ever know . . . with absolute certainty . . . all the facts

about any situation in real life which involves people?

Finally, suppose that, by a stretch of the imagination, an "answer" could be developed to fit a given set of facts, as set forth in a case. Even that "answer" would be of questionable value.

For example, suppose the case involves the efforts of Foreman Jones to explain the advantages of quality control to Employee Smith. A group decides that, considering all the facts known to them, Jones should have made moves A, B, and C. If he had only done that, Smith would have seen the light . . . to his advantage.

Of course, there's no certainty that those moves would have worked, since the group doesn't have all the facts. But assume, for a moment, that they did have all the facts. Do they have the "answer"?

We know that people are different from day to day. They are different from person to person. And they are different from situation to situation. So if we change either the people, the time, or the environment . . . we no longer have a valid "answer."

That is, we have an "answer" only to that one situation described in the case . . . involving Jones and Smith, at a specific time, at a specific place, under specific circumstances.

The "answer" won't necessarily help Foreman Doe when he talks to Employee Roe in a different environment. In fact, it wouldn't necessarily have helped even the original Jones if he talked to Smith just one day after the reported events took place.

Our answer, it appears, is not going to be directly useful to us.

So, if a case study group does not come up with "answers," what does it gain? It gains understanding of how a certain set of people reacted under a given set of circumstances. It penetrates quite deeply into some of the possible causes of their behavior and feelings. The exploration is broad because each member of the group brings to his study of the case a different complex of experience, knowledge, and attitude. The data in the case are examined from as many angles as there are members in the group.

The Preliminaries

The particular cases to be discussed will vary widely in length and degree of difficulty. The subject, the competence of the group, and other factors determine the selection. If long and difficult cases are used, the group must have time to prepare them in advance. Just

reading a case is seldom enough preparation to insure

maximum benefit from case study discussion. Careful

analysis of the case supported by notes is very much in

order. In fact, it is sometimes wise to write a short

paragraph on a significant issue in the case as part of

your preparation.

E. The Seminar's Educational Approach

Learning as a group process goes back in history at

least to 2500 B. C. and Sumer. In that fabled land be-

tween the Tigres and Euphrates rivers, in what is now

Iran, many of our customs were first recorded in the

Sumerian's wedge-shaped writing.

Samuel Noah Kramer, the University of Pennsylvania's

noted Sumerologist, is our authority for saying that these

first schools were at the opposite extreme from today's

democratic, permissive or participative approach to educa-

tion.[1] The Sumerian schools taught cuneiform writing by

rote and by liberal use of the cane.

Ever since Sumerian times, however, the process of

learning has become increasingly a process of discovery in

which students and instructor share. The trend has seldom

---

[1]Samuel Noah Kramer, History Begins at Sumer (New
York: Doubleday Anchor, 1959).

been consistent or even reasonably periodic. Still, when you compare one century with another, a persistent trend is evident. In our time there is a noticeable expansion of participative learning techniques out of the lower grades into the high school and college.

Whether in the demonstrations and symposia of the technical schools, the seminars in liberal studies or the case studies of the business schools . . . our colleges are engaged in participative instruction. Similarly, the proliferating media of adult education most often involve the student ever more deeply in the learning process. Especially in industrial education--or more properly, education in business and industry--is learning becoming a process in which the student is accountable himself for what he learns.

Since the ancient schools of Sumer, education has always been at its best an exciting process of discovery. The increasing participation of the student in learning warrants our presenting the Leadership of Learning as a process of shared discovery. Our view shall make of learning a process in which the instructor provides an environment that is at once both non-threatening and challenging. He makes certain that the student has ready access to the knowledge he will require. And the student

is accountable himself for what he learns.

The Seminar will involve the extensive use of small, face-to-face discussion groups. Some educators maintain that the tutorial relationship is best for learning; and the fact that learning occurs only on an individual basis is not disputed. There are at least two reasons, however, why we prefer to use group techniques. The sheer numbers of employees to be educated today militate against the use of the tutorial system. It was most practical when only a small portion of the employee group was considered eligible for education. The other reason is that under proper conditions the members of a small group tend to motivate each other, sometimes even to help each other toward understanding. Sometimes a kind of chain reaction occurs. Then each member of the group may build upon the interests and insights of the others.

APPENDIX IV

SEMINAR EVALUATION

A. The Discussional Summary Held at the End of the Seminar

    1. Explanation of the technique.

    2. An edited transcript of the discussional

    summary.

The Discussional Summary

Much of what occurs in a series of discussion type
meetings is likely to be interpreted in as many
ways as there are members of the discussion group
(plus one more for the leader). Each member will
draw from the series a unique complex of impres-
sions highly influenced by his own personal needs,
interests, biases, background, and semantic sensi-
tivity. Unless each has a chance to learn what
the others have drawn from the shared experience,
each member will have only his own subjective im-
pression upon which to evaluate the course. Simi-
larly, each is likely to overlook some of the in-
sights others have discovered. And, finally, the
discussion leader needs an opportunity to learn
the impact of his work--not just in cold print,
but also with the the multiple perspective of the
fact-to-face communication. He will want to im-
prove future courses.

How, then, does the discussional summary materi-
alize? Long years of refining the process have
led to a deceptively simple pattern. In a "round-
robin" coverage of the group, each member states:

    1. What he found least useful in the
        experience.

2.   What he found most useful.

These two items may be any part of the experi-
ence--including the leader's performance. And
each member should--insofar as possible--be
limited to mention of one negative and one posi-
tive item. In any event, he is allowed to men-
tion no fewer negative items than positive--so
the session will not become a testimonial.

From a discussional summary, both the group mem-
bers and the leader can learn a great deal that
cannot be conveyed in a printed evaluation form.
With any participative learning project, its
use is strongly recommended--with just one word
of caution. The leader must maintain a "poker
face" throughout the discussional summary; and
in his reflecting of member comments, he must
emphasize the negative rather than positive im-
pressions they report. Otherwise the summary
will quickly lose objectivity.

The experienced discussion leader will recognize
that he runs no risk in emphasizing the negative
elements in the summary. Human nature is such
that almost always the group member will make a
compensating emphasis upon the positive in shap-
ing his own personal reaction to the discus-
sional summary. Paradoxically, it is when the
leader over stresses the positive that the mem-
bers are likely to over value the summary's
negative elements.

Transcript on the Discussional Summary

An edited transcript of the summary evaluation
of a 20-hour seminar: given by the participants
during the seminar's last hour. Each group mem-
ber is asked to identify what he found 1) least
useful and 2) most useful during the entire
seminar. It is stipulated that if he mentions
more than one positive element, he must also
mention additional negative elements in the same
number. The seminar's subject was "Organiza-
tional Relationships" and its presentation in-
volved the use of a wide variety of participa-
tive teaching methods. Quite a lot of case

study discussion occurred--some unstructured and some involving the use of subgroup work. Names and certain references have been changed to preserve anonymity.

Discussion
Leader: If you are ready now, gentlemen, let's begin the discussional summary of the seminar. Remember, as I told you last week, you can mention any part of the experience as either a useful or non-useful item insofar as you personally are concerned. Remember, too, that you will help us most if you single out one item on each side--the negative and the positive. If you do mention more than one positive item, you should mention the same number of negative items. We don't want this to turn into an old fashioned Methodist prayer meeting--or into a collection of testimonials.

What we do want is to let each group member discover what the seminar has looked like to the total group. In a discussional program, there is no practical way to do that--except to use a discussional summary.

Are you ready? We will begin with the man on my left and move in seating sequence around the table.

Alexander: What I feel was the least useful to me personally was the role playing. Where it would be of great value to a young student to learn techniques, I feel any of us with experience cannot benefit too much. And, I think each situation is different. With experience only can we learn these techniques. So I felt there was very little of use to me in that particular session. I felt the thing

of most importance to me was the discussion on listening and hearing the entire story before forming any judgment or coming to any conclusion. I found this has been a weakness on my own part. I don't always get the complete story, I think, before making a final decision. So this fact was most useful.

Bronston: Well, I agree with Sam on the least important session being the role playing. Basically because it's an artificial atmosphere. It won't fit into every situation. On the most useful, I think a lot of us were familiar with most of the theories covered in the seminar, but we thought of them as theoretical; bringing them out in the discussion here, we got more of a practical slant. Also, in many cases, points that I had missed myself in preparing the case were picked up later. I found it very useful to review after the session and see where I personally had missed some of the points that were brought up in the discussion.

Discussion
Leader: All right. Next.

Claus: I felt the most useful part was probably this last session. I came to this conclusion after reading the material. I thought I was getting to more brass tacks. It is material that we can actually put into use in evaluating ourselves or things that we are going to do. On the negative side, I thought we spent a little too much time on the silent treatment. We had an awful lot of theory on this for almost five or six meetings, and I thought this was a little bit too

much time on this particular item.

Discussion
Leader: I'm not sure I know what you mean by
               the "silent treatment."

Claus: Well, it's the theory and philosophy
               of doing an awful lot of listening.

Discussion
Leader: Oh, the emphasis on "active listen-
               ing."

Claus: To me, "listening" could have been
               handled probably in one or one and
               one-half sessions.

Discussion
Leader: All right. Thanks. Now, let's move
               on to the next comment.

Dennis: Starting with the least useful, to
               me the least useful part of each
               session was devoted to summaries of
               reports which I had already read. I
               thought it was particularly useless
               when the report was so detailed that
               it inhibited all further discussion.
               Sometimes these details seemed to
               take almost half the time devoted to
               reports of this type. I think that
               possibly the report would have been
               better if the person giving the re-
               port had summarized his findings in
               one minute. That would leave enough
               time open for discussion in the
               group. The most useful thing about
               the course is that I did not know all
               the people in the group and I found
               that getting to know these people and
               their ideas, etc., has had quite an

influence on me. I also found the talks and the emphasis on the danger of making prejudgment, in particular, useful.

Discussion
Leader: Next.

Ellison: I found the least useful part the attempt to develop a procedure to handle case studies in which we seemed to be floundering for an excess length of time in deciding what we were supposed to be doing with a case study. Probably it's a good training device, but I just thought it took too much time, that there should have been additional information given on using the case technique before we tried it. Most useful, I think, were the comments on things that we had read where the readings were contradictory. In a particular reading, certain statements would be made, and perhaps we'd all agree with them and then we read something else and a contradictory set of statements would be made and we would agree with them because it was a different situation. Just observing this I thought was worthwhile.

Discussion
Leader: Our adjusting to these different points of view in varying situations was what you thought was useful?

Ellison: Well, the fact that everybody, not everybody, but at least some of us, accepted whatever we happened to be reading at the moment and didn't seem to correlate back to other things. There are so many contradictions in what we're doing. You're supposed to

be sympathetic. You're supposed to be this, you're supposed to be that. And all these things are always right when you are talking about the individual item, but yet brought together they're contradictions.

Discussion
Leader: All right. Next.

Flint: I think the least useful thing that I found in the course was the portion of a session on "multiple transmission." I think we are all aware that a story will be distorted as it is relayed from one person to another, and all this multiple transmission did was emphasize it. It included statements which were too obviously contrary to our background. The most useful portion of the course, I felt, were all the sessions on listening. I was aware of some of the theories involved in better listening, but this emphasized these and pointed out more specifically how the theories can be used.

Discussion
Leader: Thank you. Next.

Grundy: The most valuable thing that I have received from this seminar is the value that I place now upon communications with other people. I find myself now acutely aware of some shortcomings that I've had. The least useful, in my own opinion, was that some of these cases that were cited were rather intangible as they relate to my own personal experience.

Discussion
Leader: All Right. Next.

Hale: The item that was the least valuable
                 to me personally were the discussions
                 on the theories of supervision. This
                 primarily because of the department
                 in which I work--where the job is
                 relatively specialized. There is less
                 opportunity to practice supervision,
                 at least at my level. Therefore,
                 these theories will have to be stored
                 away until some future time when (I
                 hope) I may become a supervisor. Of
                 most value to me was just being able
                 to speak out on various subjects in an
                 atmosphere of acceptance. Even when
                 there were arguments, it was a group
                 that received ideas and exchanged
                 views freely. Particularly beneficial
                 was the broad diversity of backgrounds
                 among the people represented in the
                 group.

Discussion
Leader: All right. Next.

Ingwaldson: To me, the least useful item was the
                 "vacuum theory." I'm sorry, but that
                 left me cold, and I can't find any
                 place where I could hope to use it in
                 any group that I would conceivable
                 have contact with. The most useful
                 item to me was getting to know and
                 understand better the other people in
                 our organization, and learning how
                 they think and how their minds work,
                 while rationalizing the various prob-
                 lems that we have discussed in this
                 course.

Discussion
Leader: Thank you.   Next.

Jackson: I have a statement by Jim Walston I
               think is worth reporting.   He's not
               here this afternoon and he asked me
               to make it a part of this discus-
               sional summary.

Discussion
Leader: All right.   Then you can follow it
               with your own comments.

Jackson: He said the least useful item was
               the "spiral response."   Our thought
               became redundant after four or five
               cycles in forcing home the difficul-
               ties of the listener in accurately
               playing back an individual's problem.
               He believes the same benefits could
               have been obtained by assigning four
               or five individuals to present the
               spiral response instead of attempting
               to get half way around in a group of
               our size.   You will recall that we
               did not get completely around our
               group.   He liked most the aids to
               leading a group, particularly the
               "vacuum theory," which he's had the
               opportunity of testing personally.
               It really works, he says.   All through
               the seminar he picked up ideas that he
               feels cannot help but be beneficial in
               dealing with people, whether it's one
               man or a large group.

               As for my own statement, I felt the
               least effective thing was the role
               playing.   I felt that it stretched out;
               we never did complete it, and I think
               it could have been cut down consider-
               ably in time.   The thing I enjoyed
               most was the article on "active listen-
               ing," which I believe benefits us all.

Discussion
Leader: All right. Next, please.

Kobler: Well, the item that I, too, consider
             of least value was the role playing.
             I think that it has been mentioned be-
             fore that in our normal routine we en-
             counter this quite frequently. With
             the specific role that we played here,
             it was sort of an individual case
             which may have applied to our work or
             it may not have. I, personally, feel
             that we did not gain anything from it.
             On the positive side, I felt I obtain-
             ed the most out of the many papers to-
             ward the end of the course, which got
             down to the practical aspect. I felt
             that some of the earlier papers were
             too much on the theoretical side. But
             I did gain a lot of value from the dis-
             cussions that were held in which the
             group gave their thinking and develop-
             ed a practical approach rather than
             the theoretical approach that was given
             in the readings.

Discussion
Leader: Thank you. Next.

Long: The section that I felt was least
             valuable was when we would break up
             into small groups in the early case
             discussions and try to develop laundry
             lists of the main issues involved. We
             seemed to go for quantity in the issues
             rather than picking up just the key
             issues. I felt that quite a bit of
             time was lost in that. To me, the
             most valuable part of this course was
             re-exposure to the leadership skills
             that we've all been exposed to in the
             past. But in the normal hubbub of
             day-to-day activities you let them go

into the back of your mind and remain
unexercised. I can see where re-
application of these skills can make
your job easier without extending the
time required to do it in.

Discussion
Leader: All right. Next.

Mallott: The role playing, I have to say, was
                 of least value to me; although I
                 wouldn't say that it was of no value.
                 I think it could have been appreciably
                 better if there had been more of it.
                 We have only one role playing situation
                 and I think that if we had several of
                 the same general type, I might have
                 gotten more out of it. On the positive
                 side, I have to say that there were two
                 items, actually, and I don't know which
                 comes first. One is the opportunity to
                 meet a bunch of fellows in the organi-
                 zation that I probably wouldn't ever
                 get to know very well in the normal
                 course of business. The other one is
                 that this seminar provided an opportun-
                 ity to talk--enough to really talk
                 things out. And the talking was like
                 talking to a sounding board where I
                 didn't know exactly what I was going to
                 say sometimes until I said it. But by
                 talking enough and listening enough to
                 what other people said, the ideas that
                 I ended up with were not necessarily
                 the ones I started out with.

Discussion
Leader: Thank you. Let's have the next comment.

Nevers: Considering myself somewhat of a non-
                 conformist, and after listening to
                 the most useful and least useful
                 reasons that have so far been given, I

still feel that most useful to me was
the realization that I am not a good
listener. I prejudge; I do everything
that we say is wrong in dealing with
people. I am not a good leader, not
a good administrator, highly negative
all the way down the line. But I am
impressed by the fact that we work for
a company who will devote the time and
effort to give us an insight into our
own failings. Then, again, least use-
ful, I found, was being awakened to
these failings and then having the
future fear of not getting any more
guidance in becoming a leader, becom-
ing an administrator, or a good lis-
ener, or not prejudging.

Discussion
Leader: What worries you, right now, is a lack
            of specific information about how to
            remedy some of the weaknesses that are
            exposed. Just recognizing weakness,
            of course, is a step in the right di-
            rection. All right. Next, please.

Obenhaus: I feel, myself, that probably of most
            benefit were the small insights into
            the psychological reasons that moti-
            vate people. In some of these cases,
            I think we've seen them, and, also,
            there is the theory of "active listen-
            ing." I've come to a very definite
            conclusion that the spoken word is
            seldom what it seems to be. On the
            other hand, I agree with many of the
            others that the role playing left a
            lot to be desired. I thought that it
            was not a true atmosphere and every-
            thing was being acted rather than ex-
            perienced. For this reason, I feel
            that this could have been eliminated.

Discussion
Leader: Thank you.   Next.

Parker: To me, the least useful aspect was the
                 lack of answers or conclusions in the
                 cases we studied. We went to great
                 lengths with "Annelo" and "Correli,"
                 but I don't think that we came to any
                 specific conclusions as to just what
                 should be done with these people.
                 There's a kind of a frustration there.
                 And the most useful aspect, I think,
                 was this exchange of ideas, getting to
                 really know people to whom we just
                 nodded in the corridors previously.
                 It brings about a friendliness, I be-
                 lieve. One other value for me was the
                 realization that every situation re-
                 quires a search for things other than
                 the obvious.

Discussion
Leader: All right.   There is one other comment
                 submitted before the meeting because
                 John Quill could not be here today.
                 He found most useful the opportunity
                 to share in a discussional interpreta-
                 tion of the complex ideas presented in
                 some of the oral reports. He identi-
                 fied as least useful the fact that in
                 a company he feels is becoming a
                 "staff" organization, many of the case
                 studies treated "line" versus "staff"
                 problems and were quite elementary,
                 besides.

                 That does it, and I'm obliged to you.
                 I hope that you can see as a result of
                 this experience that the Discussional
                 Summary does have value in letting
                 each of you see how the seminar looks
                 to the rest of the group. I don't
                 think (with the discussional approach
                 that we've used in this series of
                 meetings) the course is complete unless

each of you is given an opportunity to
see what the impact of the course has
been on the whole group.

B.   Specimen Mailing of November 3, 1963 to Seminar Partici-

pants

1.   Cover Letter

2.   Exhibit No. 1 - Evaluation Form, Immediate
                     Evaluation

3.   Exhibit No. 2 - Transcript of Comments,
                     Immediate Evaluation

4.   Exhibit No. 3 - Evaluation, 90-Day Delayed
                     Evaluation

5.   Exhibit No. 4 - Transcript of Comments, 90-
                     Day Delayed Evaluation

Form 108.26 1-62 Printed in U.S.A.

(PURE)

Be sure with Pure

To: _____Seminar Participants_____

From: ___W. E. Bright, Jr.___

___Employee Development___

Subject: _SEMINAR IN ORGANIZATIONAL RELATIONS_

Date: ___November 5, 1963___

The Seminar In Organizational Relations was a most interesting
experience due to the widely diverse backgrounds and specialities
of its members. From the moderator's perspective the difficulty
of maintaining the balanced interest of such a group was more
than offset by the benefits of bringing its members in contact and
communication with each other.

Attached is a combined summary of the immediate and 90-day delayed
evaluations of the Seminar. Also attached are four numbered items.

Exhibit #1 - Evaluation Form, Immediate Evaluation
Exhibit #2 - Transcript of Comments, Immediate Evaluation
Exhibit #3 - Evaluation Form, Delayed Evaluation
Exhibit #4 - Transcript of Comments, Delayed Evaluation

Very truly yours,

Bill Bright

WEB/jd

Attachments

EXHIBIT #1

EMPLOYEE DEVELOPMENT AND TRAINING
EVALUATION FORM

Name of Course (or Project) <u>Seminar On Organizational Relations</u>

<u>(Immediate evaluation)</u> **(1-3)**

Number of Meetings (or Separate Units) <u>8 Fridays (half-days)</u>

Date Begun <u>May 10, 1963</u> **Date Ended** <u>June 28, 1963</u>

Location(s) Where you Participated <u>Palatine, Illinois</u> **(4-7)**

Instructor(s) (or Leaders) <u>W. E. Bright, Jr.</u>

> <u>NOTE:</u> <u>Opinions of emphasis indicated by →.</u>
> <u>Strongest opinion in each segment is</u>
> <u>underlined.</u>

<u>NOTE:</u> Please check every statement you agree with!

I. Personally I feel this course should be described as follows:

      (8)   <u>6</u>   It has helped me greatly in my present job.
→ (9)   <u>10</u>   It might help me in a future job.
→ (10)   <u>12</u>   <u>It was indirectly beneficial.</u>
      (11)   <u>1</u>   It was interesting but of no special help to me.
      (12)   It was often boring but I did learn something.
      (13)   It was both boring and pointless.

II. In my opinion this course should be made available to:

      (14)   <u>1</u>   All employees.
→ (15)   <u>8</u>   Selected employees.
→ (16)   <u>8</u>   <u>All supervisors.</u>
      (17)   <u>5</u>   Selected supervisors.
      (18)   <u>5</u>   All managers.
      (19)   <u>3</u>   Selected managers.
      (20)   <u>4</u>   A few carefully selected managerial prospects.
      (21)   No one.

2.

III. The kind of development/training represented by this course should be scheduled:

→ (22)   15   On Company time.
    (23)   3   Half on Company time, half on personal time.
    (24)   3   Entirely after working hours.

IV. In my judgement the money and effort required to make this course available are:

→ (25)   16   A sound investment.
    (26)   3   A risky investment.
    (27)   1   A very poor investment.

V. I liked the following parts of the course:

→ (28)   15   Subject matter.
    (29)   11   Methods of instruction.
→ (30)   13   Resource or reference materials.
    (31)   3   Demonstrations.
→ (32)   15   Case study discussions.
    (33)   3   Role playing.
    (34)   3   Lectures.
    (35)   Visuals.
    (36)   12   Meeting room facilities.
    (37)   11   Hour at which meetings were held.
→ (38)   14   Make-up of group attending.
→ (39)   17   Opportunity to share ideas with other participants.
→ (40)   15   Skill of instructor(s).

VI. I did <u>not</u> like the following parts of the course:

(41) __4__ Subject matter.
(42) __2__ Methods of instruction.
(43) __1__ Resource or reference materials.
(44) __1__ Demonstrations.
(45) __1__ Case study discussions.
→ (46) __13__ <u>Role playing.</u>
(47) __1__ Lectures.
(48) __2__ Visuals.
(49) __1__ Meeting room facilities.
(50) __4__ Hour at which meetings were held.
(51) ____ Make-up of group attending.
(52) ____ Skill of instructor(s).

VII. The following changes should be made in this course:

(53) __6__ None; I like the course as it was.
(54) __5__ It should be longer.
(55) __1__ It should be shorter.
→ (56) __11__ <u>It should be more practical.</u>
(57) __1__ It should emphasize theory more.
(58) __5__ It should be redesigned to change emphasis on subjects covered.
(59) __5__ There should be more discussion.
(60) ____ There should be less discussion.
(61) __6__ The discussion should be devoted to more appropriate subjects.

VIII. On the basis of its value to me in my work (and in comparison with similar courses I have attended) this course (or project) should receive the following rating:

→ (62) __8__ <u>The best such course I have attended.</u>
→ (63) __8__ <u>Among the better courses attended.</u>
(64) __3__ Average among such courses.
(65) __1__ Below average.
(66) ____ Among the poorer courses attended.
(67) ____ The worst such course ever attended.

EXHIBIT #2

IMMEDIATE EVALUATION

SEMINAR ON ORGANIZATIONAL RELATIONS

May 10 through June 28, 1963

Participants' Written Comments Regarding the Program

Directly relating the contents of the seminar to my present work, I firmly
believe that it has made me conscious of the problems inherent in speaking
with others and of the strenuous effort that must be made by all communi-
cants before any problem can be intelligently discussed and solved. I
would suggest that the leader of the seminar impart more of his knowledge
and experience--perhaps this entails a longer period of meetings.

My personal reaction to the course was rewarding, particularly the
summaries given by those present at the end thereof. One suggestion I
might make is that the leader not watch the clock and give the impression
that we are not on schedule. The repeated comment "We're running overtime"
or "We've got to move on" made me feel we had exhausted a subject when in
fact we had not really gotten into it. Just move on without reference to time.
It is gratifying to know how others think on the same questions and come
up with different answers. I conclude that man by nature is good.

It did seem that we were always trying to cover a little more ground than
the time allotted would permit. It occurred to me that it might be des-
irable to have as many sessions as required to get through the subject matter.
That is, instead of a fixed schedule of eight sessions have seven to ten
meetings according to the speed at which the group can assimilate the
subjects.

I found the discussions and exchange of opinions very interesting and
helpful as well as the opportunity of meeting other employees in similar
positions. I found myself attempting to relate their opinions and remarks
to their problems and departments as well as my own. The review of the
various theories was most helpful.

Portions of the seminar were devoted to improving communications, a
most worthy goal. The approach generally appeared to be an effective
one and I believe I gained considerable benefit from the course material
and discussions in this area. Some reading material, particularly the
case studies, left much to be desired. The ensuing discussions took far
too much time as the group sought to find meaning for the inclusion of
the material. Whatever the value it could not justify the time taken.
From my point of view, the group was too large by six to eight persons.
I find a small intimate discussion most stimulating and enjoyable. As
a group increases in size there occurs much repetition, redundancy and
irrelevancy.

This seminar brought into focus the importance of little things that are
frequently overlooked in dealing with people because of everyday business
pressures--curtness, listening to others, spending time with people in the
department. The correction of bad personal habits in this respect is not
easy, especially if the same attitudes do not exist throughout all
supervisory and management levels. I do believe that participants in
this program will be more sensitive to the needs of their people and
fellow workers, at least until this sensitivity is again eroded by paper
and other business pressures.

I personally enjoyed the course very much. I appreciate the opportunity of
becoming better acquainted with responsible members of our organization and
learning how they think and react to the problems posed by the course.
However, I went through much of the course wondering what the objective
was and to what use I could apply the theories, etc. advanced. I feel
that more initial emphasis on the objectives of the course and why each
person was selected to attend would have helped to dispel this doubt.
In spite of my own enjoyment of the course and the broadening effect it may
have had on me, I have some reservations regarding whether it can be
justified economically from the benefits which the Company might gain from
it.

The seminar was an excellent opportunity to get to know other people in
the organization who I might not ever have had the opportunity of meeting.
The atmosphere of free discussion and thought is hard to match in the
normal course of business and this has helped to, insensibly perhaps, build
up a better background for dealing with personnel problems. It is much
easier to deal with things than to deal with people, but the only way to
improve in the latter is to practice it.

I believe that the course was beneficial, particularly in getting to know
others in the organization that I do not usually come in contact with.
I also gained an insight into communications and supervision that I did
not have before the course. The weakest part seemed to be the time lost
on certain points of low value, e.g., what is the value of someone
reporting on an article that you also have read? What is the value of
making extensive laundry lists on case studies when there may not be
enough time left to cover even two or three points. Role playing could have
been handled better. I would also like to see Bill Bright work in a
formal presentation or two--possibly at the end.

I was somewhat at a loss as to why I was included in the group. However,
I anticipate that the benefits of the course will be useful to me in
future assignments. The theories recalled and the general subject matter
of the course, while not new, were set forth in a useful and logical
manner. Review of the notebook material at various times in the future
should be most beneficial.

There is much value in this course; it gave me an awareness of people
and things that I had not considered before. Bringing together people
of diverse backgrounds to exchange thoughts and ideas was most interesting.
I am particularly gratified that the Pure Oil Company has the foresight
and interest in their people to provide the time, money and effort required
to offer such an enjoyable and rewarding experience.

I felt the time was very productive and will be of good use to me directly
and to the Company indirectly. I would like to see this study and
training expanded to future seminars.

I feel that this type of course is very useful and have begun applying
principles used here in associations with subordinates and in dealing
with other supervisors--finding it helpful. The principles are not necessarily
new, but their use can make life and the job easier and more enjoyable
since they can avoid misunderstandings that people might make of what I
might normally say or do.

More emphasis should be placed upon the practical rather than theoretical
phases of "communication" since this is one of the basic problems in
industry today. In general, I felt the course was very beneficial and
provided some new ideas which will be explored in the course of my job.

I believe that the subject matter should be changed to cover less theory but more practical things. A discussion of a particular case should be concluded with a comparison between the group's answer to the problem or problems of the case and the solution of a person or persons who are skilled in the handling of such problems.

I think that the discussions were too free, i.e., if the discussion became circular it was allowed to go round and round. I enjoyed the theory but thought much of it emphasized ideal and extremely limited conditions.

I enjoyed the course very much. I thought it was well conducted and so far has been very helpful. Personally, I feel this type of course would be very helpful to line supervision.

The seminar was well conducted by Bill Bright. The course provides an excellent insight into the problem of communicating with your fellow man. I would like to know some of the solutions that were made in the case studies we had. I felt that something was missing without this answer.

Basically this was a good program but, in my opinion, the following might add to its value: 1) the program should be one continuous session lasting five days, eight hours per day, instead of drawn out over such a long period of time; 2) the meetings should be at a location apart from the office; and 3) the vacuum theory of leadership was over-used. If direct and strong leadership was not needed, then we might just as well have met in groups at coffee breaks and during lunch periods for our "bull" sessions.

Form 1122.54 5-62

EXHIBIT #3
EMPLOYEE DEVELOPMENT AND TRAINING
EVALUATION FORM

Name of Course (or Project) Seminar On Organizational Relations

(3-month delayed evaluation) _____ **(1-3)**

Number of Meetings (or Separate Units) 8 Fridays (half-days)

Date Begun May 10, 1963 _____ Date Ended ___ June 28, 1963 ____

Location(s) Where you Participated __ Palatine, Illinois _____, __ **(4-7)**

Instructor(s) (or Leaders) ___ W. E. Bright, Jr. _____

> NOTE: Opinions of emphasis indicated by →.
> Strongest opinion in each segment is
> underlined.

NOTE: Please check every statement you agree with!

  I. Personally I feel this course should be described as follows:

    → (8)   10   It has helped me greatly in my present job.
    → (9)   13   It might help me in a future job.
    → (10)   11   It was indirectly beneficial.
      (11)   3   It was interesting but of no special help to me.
      (12)   1   It was often boring but I did learn something.
      (13)   ____   It was both boring and pointless.

  II. In my opinion this course should be made available to:

      (14)   1   All employees.
    → (15)   9   Selected employees.
    → (16)   11   All supervisors.
      (17)   4   Selected supervisors.
    → (18)   7   All managers.
      (19)   1   Selected managers.
      (20)   4   A few carefully selected managerial prospects.
      (21)   ____   No one.

2.

III. The kind of development/training represented by this course should be scheduled:

→ (22) 17 On Company time.
   (23) 2 Half on Company time, half on personal time.
   (24) 2 Entirely after working hours.

IV. In my judgement the money and effort required to make this course available are:

→ (25) 19 A sound investment.
   (26) 2 A risky investment.
   (27)   A very poor investment.

V. I liked the following parts of the course:

→ (28) 18 Subject matter.
   (29) 13 Methods of instruction.
   (30) 10 Resource or reference materials.
   (31) 5 Demonstrations.
   (32) 10 Case study discussions.
   (33) 4 Role playing.
   (34) 7 Lectures.
   (35) 2 Visuals.
   (36) 13 Meeting room facilities.
   (37) 11 Hour at which meetings were held.
→ (38) 18 Make-up of group attending.
→ (39) 20 Opportunity to share ideas with other participants.
→ (40) 16 Skill of instructor(s).

VI. I did <u>not</u> like the following parts of the course:

(41)   _1_   Subject matter.
(42)   _1_   Methods of instruction.
(43)   ____   Resource or reference materials.
(44)   ____   Demonstrations.
(45)   _6_   Case study discussions.
→ (46)   _15_   Role playing.
(47)   ____   Lectures.
(48)   ____   Visuals.
(49)   _1_   Meeting room facilities.
(50)   ____   Hour at which meetings were held.
(51)   ____   Make-up of group attending.
(52)   ____   Skill of instructor(s).

VII. The following changes should be made in this course:

(53)   _5_   None; I like the course as it was.
(54)   _2_   It should be longer.
(55)   _2_   It should be shorter.
→ (56)   _10_   It should be more practical.
(57)   ____   It should emphasize theory more.
(58)   _4_   It should be redesigned to change emphasis on subjects covered.
(59)   _3_   There should be more discussion.
(60)   _2_   There should be less discussion.
(61)   _6_   The discussion should be devoted to more appropriate subjects.

VIII. On the basis of its value to me in my work (and in comparison with similar courses I have attended) this course (or project) should receive the following rating:

(62)   _3_   The best such course I have attended.
→ (63)   _12_   Among the better courses attended.
(64)   _3_   Average among such courses.
(65)   ____   Below average.
(66)   ____   Among the poorer courses attended.
(67)   ____   The worst such course ever attended.

EXHIBIT #4

3-MONTH DELAYED EVALUATION

SEMINAR ON ORGANIZATIONAL RELATIONS

May 10 through June 28, 1963

Participants' Written Comments Regarding the Program

I found the course very interesting and stimulating. At certain points,
especially in case studies, I felt that a solution should have been
given by the instructor to see if the solution arrived at by the
participants would be similar or the same. On the second thought I
realized (from previous emphasis) that there is no definite solution
to any problem. Each one of us must find the best method for solving
a problem. I feel that more could be benefited from the role playing
if the roles were assigned in advance for the next session instead of
assigning them as the course progressed. I am grateful for the ex-
perience it gave me. I am sure the course will be very beneficial in
my future dealings with individual employees or a group of them. I
feel certain that this course is very beneficial to a newly promoted
supervisor who has had very little experience in dealing with employee
problems.

I personally appreciated the course for three major reasons: 1) It
allowed me to meet and get to know better a group of fellow employees
I might otherwise not have known. Their opinions and comments were
quite enlightening. 2) The course drove home several valuable points
which I now use in my relations with others. 3) The course was a
renewed demonstration of the interest the company has in its employees--
particularly me. This was duly noted and appreciated. Like most any
course of study, some alteration in the relative amounts of each
topic discussed could be made. Some topics were better presented than
others. I am sure you are aware of these minor points so I will not
again elaborate on them.

I certainly consider the course to be of benefit since I now often
find myself applying some of its basic thoughts--particularly in the
area of active listening. If anything, I would suggest it be expanded
to include more problems pertinent to the oil industry. I feel very
strongly that this is a worthwhile investment on the part of the
company.

There seemed to be complete freedom in expression of individuals' thoughts which I felt was exceptionally good. I was particularly interested in those areas where my opinions and beliefs were not shared by most of the group and also where there were one or two who had divergent opinions in relation to the group. Much of the case study involved blue collar workers and factory situations. Whether these are as helpful as cases closer to home may be a debatable issue, but I feel that the latter would be more helpful to individuals in our situation.

Briefly my reactions to the course are: 1) The course gave me a taste of knowledge of myself and of others for which I now want to know more. 2) I became well aware of my own failures and at least now have an insight as to how to correct them. 3) It is gratifying to learn that others are self-conscious, falter in their speech, do not say what they mean at all times, and you are not alone in the boat. 4) I did learn how to listen and not to prejudge and I carry with me an ever growing awareness of this in myself and look for it in others. 5) I wish time would permit further study along the same lines.

I enjoyed the course. It was very interesting and the informal atmosphere presented a good opportunity to become better acquainted with other people in our Company. However, it appeared to me that the course was pitched on too much of a theoretical plane; also that the reading matter was selected with the intent of "proving" the infallibility of the theories or techniques expounded. While I enjoyed the course, in all sincerity I cannot see how The Pure Oil Company will stand to profit from the twenty hours of job time I spent on it. For this reason I feel that the course time should be divided equally between Company and personal time.

While the course did not help me greatly in my present job, I believe it was of some immediate help and will possibly be of much greater help in the future. There was too much discussion of some of the case studies and the case study discussions should be ended by telling the group how an "expert" would have solved the problem instead of merely letting the group wonder if they reached the right conclusion.

I feel that some of the subject matter was extraneous and provided some rather dull discussions. If these subjects were taken out and replaced with a more active type of matter, I feel sure that an outstanding course would be provided.

In some instances discussions should have been guided more carefully
so that the ultimate goal was kept aligned. I feel that attending the
course has made me more sympathetic to the problems of others in
communicating with me, and hopefully it has reduced problems in their
understanding me and my actions. I feel the time was well spent.

Much of the time spent on case studies might have been more beneficial
if conclusions could have been resolved. I also felt that the re-
ference reading could have been more on the practical than theoretical
side--which it did toward the end of the course.

I liked the opportunity of meeting other men in parts of the Company
with which I have no opportunity for contact. It is difficult to say
that any specific thing was learned, but no doubt the exposure to
ideas has added to the background of knowledge on which discussions
are based.

We should practice what we learn.

The course was very helpful to me. Since the completion of it situa-
tions have occurred in which I recalled our discussions covering
similar instances in the case studies. I feel this alone was helpful
to me in arriving at more sound decisions.

I believe greater benefits could have been derived had Mr. Bright
imparted more of his knowledge and skills in lecture form. Summing up,
I believe the course has helped me in dealing with certain types of
individuals, and I certainly believe I could use other courses of this
type to advantage.

The value of a seminar such as this was the discussions of the subject
matter which depends a great deal upon the skill of the instructor
to guide and the "make-up" of the group attending. I feel that this
was a most interesting and beneficial seminar.

I feel the course was worthwhile because of its lasting impressions.
I find myself now attempting to make an analysis of situations to
determine whether there are factors involved which do not seem to be
apparent on the surface of the situation.

I would recommend efforts be made to develop a more efficient group participation device than is provided by the case study and role playing approaches. Both of these techniques permit a passive attitude by a fair percentage of the group.

Certain materials utilized in the course came in very handy at a subsequent seminar. Because of the greater exposure, the various communication theories took on more significance. As mentioned previously, the immediate use of the seminar is limited, but should stand me in good stead at some future date.

<u>COMBINED SUMMARY</u>

Immediate and 3-Month Delayed Evaluations
of Seminar On Organizational Relations
(May 10 thru June 28, 1963)

I. <u>Personally I feel this course should be described as follows</u>:

Note the increase in mentions from 6 to 10 for "It has helped
me greatly in my present job" in the Delayed Evaluation.
Throughout this item the opinion appears to have improved
with time.

II. <u>In my opinion this course should be made available to</u>:

Again a significant improvement has occurred with time.

III. <u>The kind of development/training represented by this course
should be scheduled</u>: ·

After 90 days two more attendees feel the course should be
presented on Company time.

IV. <u>In my judgement the money and effort required to make this
course available are</u>:

Three more persons felt the course was "a sound investment"
after 90 days.

V. <u>I liked the following parts of the course</u>:

This group was even more of a cross section sample of the
organization than is usual in such a seminar. Perhaps as a
result the members emphasized what they learned from each
other in both evaluations. Their appreciation of subject
matter, however, increased with time.

VI.   I did not like the following parts of the course:

As the group's liking for the subject matter increased, so also
did its distaste for role playing--an instruction method used
in just one of the eight meetings that made up the course.
Similar evidence is beginning to suggest that role playing must
be allotted more time than this in order to be appreciated. An
interesting distaste for case study discussion seems also to
have developed with time. This may actually be a reversion
to a prior opinion rather than a new development.

VII. The following changes should be made in this course:

No significant change. Even more than most groups this one
tended to resist concepts that appeared to be new or strange
to them. The "more practical" comment in this context, of
course, usually indicates disagreement with concepts or methods
encountered.

VIII. On the basis of its value to me in my work (and in comparison
with similar courses I have attended) this course (or project)
should receive the following rating:

Initial enthusiasms tend to dissipate with time. The "among
the better" rating in the delayed evaluation is probably the
more accurate finding. A couple of "best" ratings were simply
dropped out of the delayed tally because footnotes indicated
this was the only such course attended.

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