ABSTRACT

        PETC-III is one of several instructional systems
currently under development in the Improving Teaching Competencies
Program of the Northwest Regional Educational Laboratory. The
PETC-III materials include training strategies and procedures plus
participant instructional materials for use with a select group of
educators in a workshop setting. PETC-III carries with it a change
support process termed organizational development. This document
presents the evaluation report for the pilot stage of the PETC-III
system's development. This evaluation was conducted to facilitate
judgments about the efficacy of materials, strategies, and the
accompanying change support process that comprise the PETC-III
instructional system. The first chapter describes the system's
history and objectives. The second chapter describes the pilot test
workshop study, including methods of obtaining information, and
presents the empirical evidence collected from the workshops. The
next chapter describes the process of the expert external review
conducted on the PECT series and presents a summary of the review
critiques. This is followed by a description of the search for
alternative training programs on the market and a comparative
analysis of the search results. The final chapter contains a summary
of the findings. Appendices include the Improving Teaching
Competencies Program's product development model, questionnaires used
in the pilot test workshops and documents pertaining to the
implementation and results of the external review and alternatives
search. (EC)

PILOT MILESTONE REPORT FOR
PREPARING EDUCATIONAL
TRAINING CONSULTANTS:
ORGANIZATIONAL DEVELOPMENT (PETC-III)

Improving Teaching Competencies Program

David Green
Richard I. Arends

March 1976

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PREFACE

This publication is one of a series of technical evaluation reports issued by the Northwest Regional Educational Laboratory to document evaluation findings for selected products. The subject of this report is *Preparing Educational Training Consultants, Organization Development (PETC-III)*, an instructional system developed in the Improving Teaching Competencies Program.

This technical report presents the data collected about the system and its objectives during the 1974-75 field tests. The information has been used in subsequent revisions of the system by its developers, René Pino and Ruth Emory.

The report has undergone an institutional technical review conducted by Laboratory specialists external to the Program.

Lawrence D. Fish
Executive Director

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ACKNOWLEDGMENTS

INTRODUCTION

Preparing Educational Training Consultants: Organizational Development (PETC-III) is one of several instructional systems currently under development in the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory (NWREL). The *PETC-III* materials include training strategies and procedures plus participant instructional materials for use with a select group of educators in a workshop setting. *PETC-III* also carries with it a change support process termed organizational development (OD).[1]

PURPOSE OF THE EVALUATION

The development model employed by the Improving Teaching Competencies Program divides the production of an instructional system into five developmental phases (planning, pilot, interim, field test and outcome). These phases are fully spelled out in Appendix A. This document presents the evaluation report for the pilot stage of the *PETC-III* system's development.

The main purpose for conducting this evaluation was to facilitate judgments about the efficacy of the materials, strategies and the accompanying change support process that comprise the *PETC-III* instructional system. Specifically, evaluation activities collected information so judgments could be made about the:

1. Efficacy and the quality of *PETC-III*

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[1]Organizational development is a strategy for organizational change. It is a set of practices that has evolved in industrial, governmental and (more recently) educational settings. The purpose of organizational development is to improve organizational health and effectiveness. The aid of *PETC-III* is to train educational personnel who will then provide organizational training and consultation to local educational organizations.

2. Educational need for the instructional system and the proposed change support process

3. Sufficiency and feasibility of the instructional system and the proposed change support process in regard to goals, content, strategies, disseminability and costs

4. Claims for the superiority of the instructional system and the proposed change support processes in comparison to existing alternatives

The function of this report is to present to decision-makers at NWREL and the National Institute of Education (NIE) who are not directly involved in the development or evaluation of the instructional system, a summary of the evaluation activities and findings provided to the developers during the pilot stage.

INFORMATION NEEDS OF THE EVALUATION

This evaluation sought information about the need for, alternatives to, and the sufficiency and feasibility of the PETC-III instructional system and its proposed change support process.[2] To facilitate the gathering of this information, evaluation issues were expressed in a series of questions. The questions have been sorted into three categories. The first category relates to trainees' judgments about the instructional system and PETC-III training. The second category includes questions concerned with the adequacy of the instructional system from the perspective of outside reviewers. The third category of questions relates to existing alternatives to the instructional system. These questions are listed below:

Questions Related to Trainee Judgments About PETC-III

1. To what degree do persons trained in PETC-III during the pilot trials perceive the content, materials, activities

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[2]The original evaluation design specified looking at the effects of PETC-III training during later stages of development. Funding cutbacks curtailed this investigation.

and structure of the instructional system as being of high quality and effective?

2. To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being relevant and useful?

3. To what degree do persons trained in *PETC-III* during the pilot trials perceive the goals and objectives of the instructional system as clear and significant?

4. To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being valuable in relation to costs incurred?

5. To what degree do persons trained in *PETC-III* during the pilot trials perceive the pretraining materials as being adequate and sufficient?

6. To what degree do persons trained in *PETC-III* during the pilot trials report satisfaction with the training?

7. To what degree do persons trained in *PETC-III* during the pilot trials report a need for OD consulting abilities in the educational community and to what extent can *PETC-III* meet this need?

8. What type of people acquire *PETC-III* training during the pilot trials and to what type of organization do they extend consulting help during the practicum experience?

Question Related to Outsider's Perspective of PETC-III

9. From the perspective of impartial outside reviewers, are the goals, content and training strategies for *PETC-III* adequate in terms of their significance, completness, feasibility, social fairness, etc.?

Question Related to Alternatives to PETC-III

10. What are the existing alternatives to *PETC-III* and how does *PETC-III* compare to these alternatives in terms of: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination?

To meet the evaluation needs set out in the above questions, three investigations were carried out: a series of four pilot workshops of the *PETC-III* system, an alternatives search for comparable training programs and an external expert review.

This report includes five chapters. In the first, the FETC-II instructional system is described including its history and objectives. The second chapter describes the pilot test workshop study, including methods of obtaining information, and presents the empirical evidence collected from the workshops. The next chapter describes the process of the external expert review conducted on the FETC series and presents a summary o. the review critiques. This is followed by a description of the search for alternative training programs on the market and a comparative analysis of the search results. The final chapter contains a summary of the findings. Appendices include the Improving Teaching Competencies Program's product development model, questionnaires used in the pilot test workshops and documents pertaining to the implementation and results of the external review and alternatives search.

DESCRIPTION OF THE PETC-III INSTRUCTIONAL SYSTEM

Preparing Educational Training Consultants: Organizational
Development PETC-III, is one in a cumulative sequence of seven
instructional systems developed by the Improving Teaching Competencies
Program of the Northwest Regional Educational Laboratory to provide
process and organizational development skills for educational consul-
tants. These seven systems form a comprehensive training program
entitled Preparing Organizational Development Specialists (PODS) which
consists of a series of three PETC training systems: PETC-I: Skills
Training; PETC-II: Consulting; and PETC-III: Organizational Develop-
ment, as well as four prerequisite training workshops in fundamental
process skills including Interpersonal Communications, Research Utilizing
Problem Solving, Interpersonal Influence and Social Conflict and
Negotiative Problem Solving.

As the culminating training system in the PODS program, PETC-III
provides participants with the opportunity to acquire the knowledge,
skills and sensitivities that constitute a change process termed
Organizational Development (OD). It provides training that enables
trainees to help an educational organization (a) achieve structural and
normative change, (b) improve its functional capabilities and (c) develop
new functions that facilitates change in the kinds of objectives it sets
for itself and to utilize new kinds of resources.

OVERVIEW OF ORGANIZATIONAL DEVELOPMENT

Organizational development as conceptualized by the development
staff of the Improving Teaching Competencies Program is a strategy to
promote organizational change. It is based on some of the theory

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emanating from the models of "planned change" (Lippitt, Watson and
Westley, 1958; Havelock, 1972) and "action research" (Lewin, 1947;
Coch and French, 1948; Jung and Lippitt, 1966). It also incorporates
intervention strategies tested by several researchers (Miles et al.,
1969; Seashore and Bowers, 1970; Lake and Callahan, 1971; McElvaney and
Miles, 1969; Schmuck and Runkel et al., 1972). Organizational develop-
ment aims to help people in schools increase their competencies so they
can more effectively manage the human component of their organizations.
The basic strategy of organizational development is to provide training
and consultation that involve educators in identifying, diagnosing and
modifying the norms, structures and processes of their own organization.
Through these normative, procedural and structural changes, it is
intended that the organization can build and maintain increased
functional capabilities and that its health will be improved.

The rationale for preparing organizational development consultants
for school organizations includes three current situations: (a) schools
are not as healthy and as effective as they could be (Miles, 1964;
Havelock, 1972; Schmuck and Runkel, 1972); (b) few school organizations
have the financial resources to hire expensive outside professional
organizational consultants over long periods of time; and (c) the
number of available outside organizational consultants is inadequate
to meet the need.

FETC-III is, therefore, an instructional system and a change
support process that can be used by educators at various levels to
train organizational consultants who can, in turn, help build and
maintain increased functional capabilities in educational organizations.

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DESCRIPTION OF MATERIALS AND STRATEGIES

The system in its present form consists of a set of participant
materials, a set of instructional strategies to be used with trainees
in a workshop setting, some preliminary plans for installing a PETC-III
training program, strategies to help those trained in PETC-III to
use their skills in bringing about structural and normative changes in
their schools and to provide organizational training and consultation
for client groups.

The immediate population for PETC-III training consists of educa-
tors at any level who wish to acquire the knowledge and skills necessary
to provide organizational training and consultation to school groups.
Prior to participating as consultants in PETC-III, members of this
target population will have had to complete the six prerequisites
training systems in the PCDS training programs. The secondary target
population consists of educators who wish to receive organizational
development training and consultation from PETC-III consultants.

PETC-III training is spread over an 8-month period. During this
period, each PETC-III trainee completes a 1-day preworkshop assignment,
attends 17 days of workshop meetings and spends a minimum of 10 days
conducting an organizational development project with a predetermined
client group. The following chart outlines the timeline for major
training events.

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
Preworkshop Assignment (Total 1 Day)	4-Day Workshop Meeting	3-Day Workshop Meeting		3-Day Workshop Meeting	3-Day Workshop Meeting		4-Day Workshop Meeting

Note: There are approximately 30 to 35 days between workshop meetings for OD project work
with client groups.

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The organizational development project focuses on the organization (not individuals, committees or groups of individuals) with a view to building and maintaining improved ways of functioning in the organization. The project is a series of interventions based on data collected and analyzed that focus on structural and normative changes to improve the functioning of the organization. A project may be conducted in one part of the organization or in the organization as a whole.

Present strategies require that two persons with considerable organizational development experience and skills conduct the FETC-III workshop. The workshops are structured so that 10 to 18 trainees, divided into 2- or 3-persons teams, go through the training together.

GOALS AND OUTCOME OBJECTIVES

The goals and objectives[3] for FETC-III are divided into two categories: (a) consultant outcome goals and objectives and (b) goals and objectives for client groups. The consultant outcomes include participants' satisfaction with the training; their perceptions of its utility; and changes in their behavior, such as an increased knowledge and understanding of organizational development conceptualizations and strategies and an increased ability to exhibit the behaviors required of an organizational consultant. Outcomes expected of client groups include satisfaction with the consultation, perceptions of the consultation as useful and applicable and increased functional organizational capabilities. Specific statements of these objectives follow.

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[3]These goals are included for descriptive purposes only. Reductions in funding and development time prevented carrying out an investigation design to assess the effectiveness of the instructional system to achieve these goals.

Consultant Outcome Objectives

The FETC-III instructional system prepares participants to become educational training consultants. As a result of training, consultants are expected to be able to:

1. Identify and explain the major organizational development conceptualization and intervention strategies presented in the FETC-III instructional system

2. Meet with a potential client group and translate this group's difficulties into a statement of a specific problem or problems on which the group wishes to work

3. Establish definite and workable relationships and contract with a client group

4. Collect information from the client group so that the group's problem(s) may be diagnosed and clarified

5. Design, provide and assess the effectiveness of intervention activities that allow the client group to explore and examine alternative norms, processes and structures

6. Design, provide and assess the effectiveness of intervention activities that allow the client group to accomplish normative, procedural or structural changes resulting in increased functional capability in the organization

7. Achieve a terminal relationship with the client group by gradual withdrawal and by establishing structures and procedures to substitute for the services provided by the consultant

Client Group Outcome Objectives

Since the educational training consultant works with a client group so members can achieve and maintain improved ogranizational health, the consultant expects that the organizational development project will have some effects on the functional organizational capabilities of the client group. Specific examples of such objectives follow:

1. Improved Problem-Solving Capabilities: As a result of training in organizational development, client groups may become more adept at problem-solving. They may become more able to:

Sense problem situations

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Differentiate between kinds of problems

Attend to problem situations with shared and explicit problem-solving procedures

2. **Improved Management of Interpersonal Processes:** As a result of training in organizational development, client groups may become more adept at combining people's efforts to achieve desired task goals. It is expected that:

Vertical and horizontal communication may become more open, shared and accurate

Influence may become more shared and equalized

Decision making may become more diffused, characterized by explicit procedures and involvement of those who will be affected by or who are responsible for implementation of the decisions

Coordination may become more explicit and accepted

3. **Improved Procedures that Support Personal and Professional Growth:** As a result of training in organizational development, client groups may become more adept at viewing personal and professional development as an ongoing function necessary to the growth of the group. Therefore, it is expected that the group may provide:

Increased training opportunities for members to meet new organizational needs

Increased learning resources so members can be continuous learners

Increased feedback, formally and informally, so members can move toward new ways of understanding

4. **Improved Ways the Organization Attributes Meaning:** As a result of training in organizational development, client groups may become more adept in the ways they see and explain themselves to the rest of the world. It is, therefore, expected that the group will:

Have goals which are clear and in which members have a sense of ownership

Respond appropriately to outside demands

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This chapter discusses the pilot test workshops which were conducted as a part of the evaluation of the PETC-III training system. The chapter has two principal segments. The first section of this chapter contains a description of these pilot workshops. Topics include: the focus of the evaluation, recruitment procedures, number of participants and their biographical characteristics, and a description of the evaluation instruments used in this investigation. The second major section presents the results of the evaluation activities.

DESCRIPTION OF THE PILOT WORKSHOPS

Focus of the Evaluation

The pilot workshops were designed to: (a) assess the quality, efficacy and relevancy of the instructional system and to measure the degree of trainee satisfaction; and (b) assess the consultants' perceptions of the utility of the training and ways learning can be applied. The pilot workshops provided answers to the following evaluation questions related to trainee judgments about PETC-III:

1. To what degree do persons trained in PETC-III during the pilot trials perceive the content, materials, activities and structure of the instructional system as being of high quality and effective?

2. To what degree do persons trained in PETC-III during the pilot trials perceive the training as being relevant and useful?

3. To what degree do persons trained in PETC-III during the pilot trials perceive the goals and objectives of the instructional system as clear and significant?

4. To what degree do persons trained in PETC-III during the pilot trials perceive the training as being valuable in relation to costs incurred?

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5. To what degree do persons trained in PETC-III during the pilot trials perceive the pretraining materials as being adequate and sufficient?

6. To what degree do persons trained in PETC-III during the pilot trials report satisfaction with the training?

7. To what degree do persons trained in PETC-III during the pilot trails report a need for CD consulting abilities in the educational community and to what extent can PETC-III meet this need?

8. What type of people acquire PETC-III training during the pilot trials and to what type of organization do they extend consulting help during the practicum experience?

Description of Test Sites

Four workshops were conducted as part of this evaluation activity. A total of 50 persons were trained. These pilot-test workshops were held in Portland, Oregon; Minneapolis, Minnesota; and Seattle, Washington. Two separate workshops were conducted in Seattle and later were designated Seattle A and Seattle B.

Twelve consultants attended the workshop in Portland, held at the Northwest Regional Educational Laboratory. The five training meetings were held between April and November 1974. Recruitment of consultants for Portland as well as for the other three test sites was under the direction of the Improving Teaching Competencies Program's Office of Field Relations. Participants at all four test sites met the following criteria: (a) they had completed PETC-I and PETC-II; (b) as individuals or teams of two or three, they had access to a client group for whom they could provide training and consultation while going through the training; and (c) the district supported their interest in becoming PETC-III consultants. Vera Larsen, of the Personnel Development Office in the Portland School District, was responsible for identifying the seven district personnel who went through the training. The two primary

developers of the PETC-III training program, Ruth Emory and René Pino, served as trainers for the pilot-test workshops at all four sites.

Meetings for the Minneapolis PETC-III workshop were held in the conference facilities of the Sheraton Motor Inn at the Minneapolis/. St. Paul Airport, between May and December 1974. The 11 consultants attending the workshop were identified by Jack Tesmer, a NWREL regional representative and a consultant to the Minneapolis School District.

There were 27 participants in the two Seattle workshops, 9 in Seattle A and 18 in Seattle B. Both workshops took place in a pre-fabricated modular classroom at Rainier Beach High School. The Seattle A workshop met between November 1974 and June 1975; Seattle B between February and July 1975. James Forneris, Director of Conflict Resolution Training Programs for the Seattle Public Schools aided in identifying school district personnel for participation in these two workshops.

Participant Characteristics

A summary of the background characteristics of the participants for each of the four workshops is presented in Table 1. The reader will note that this report does not include a formal analysis of this demographic data and does not use it for any cross-tabular analysis of participant responses to other evaluation instruments. This information is included here purely as descriptive data.

The Portland and the two Seattle workshops were quite similar in three of the five participant characteristics: sex, educational back-ground and years experience in education. The three workshops had a fairly equal mix of men and women; the vast majority of the participants had graduate degrees, primarily master's degrees; and participants had

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Table 1

Distribution of FETC-III Participant Characteristics by Workshop

Characteristic	Portland N	Portland %	Minneapolis N	Minneapolis %	Seattle A N	Seattle A %	Seattle B N	Seattle B %	Total N	Total %
Number of Participants	12		11		9		18		50	
Sex										
Male	7	58	10	91	5	56	9	50	31	62
Female	5	42	1	9	4	44	9	50	19	38
Education										
Bachelor's degree	2	17	6	55	1	11	2	11	11	22
Master's degree	9	75	4	36	5	56	15	83	33	66
Doctoral degree	1	8	1	9	3	33	1	6	6	12
Years Work Experience in Education[a]										
0	1	9	0	0	0	0	0	0	1	2
1-3	0	0	2	18	0	0	0	0	2	4
4-6	1	9	3	27	2	25	2	12	8	17
7-10	1	9	1	9	1	12	3	19	6	13
Over 10	8	73	5	46	5	63	11	69	29	64
No response	1	—	0	—	1	—	2	—	4	—
Age[a]										
Under 25	0	0	2	18	0	0	0	0	2	5
25-34	1	12	6	55	4	44	6	38	17	38
35-44	2	25	3	27	3	33	6	38	14	32
45-54	5	63	0	0	2	22	4	25	11	25
Over 55	0	0	0	0	0	0	0	0	0	0
No response	4	—	0	—	0	—	2	—	6	—
Role[a]										
Administrator	4	33	0	0	2	22	5	28	11	23
Supervisor/coordinator	4	33	1	11	1	11	1	6	7	15
Teacher	0	0	3	33	3	33	1	6	7	15
Staff	0	0	1	11	3	33	11	60	15	30
Consultant	3	25	4	44	0	0	0	0	7	15
Evaluator	1	8	0	0	0	0	0	0	1	2
No response	0	—	2	—	0	—	0	—	2	—

[a]Nonrespondents were not included in the computation of percentages.

considerable experience in education (63 to 73 percent had over 10 years work experience). The Minneapolis workshop was predominantly male with less education (over half the participants had only bachelor's degrees) and less work experience in education (45 percent had six years or less experience).

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Participants in the Portland workshop were older than those in the other three workshops: whereas over three-quarters of the participants in each of the Seattle and Minneapolis workshops were between 25 and 44 years of age, the majority (63 percent) of the Portland participants were in the 45 to 54 age bracket.

There were considerable differences in the roles represented in each workshop. The Seattle B workshop was made up entirely of Seattle Public School personnel, predominantly in staff positions, e.g., counselors and psychologists. Two-thirds of the participants in the Seattle A workshop were Seattle Public School personnel in teacher and staff positions; the other trainees were public school administrators and supervisors. The Minneapolis workshop participants were predominantly public school teachers and independent consultants. The Portland workshop consisted primarily of public school administrators, supervisors and central office consultants; there were also three persons from the Improving Teaching Competencies Program's staff and two independent consultants.

Instrumentation

The following evaluation instruments were used to gather information from the pilot-workshop trainees.

Background Questionnaire. This instrument was administered at the beginning of the workshop's first meeting. The instrument was designed to obtain biographical information from the participants such as sex, age, educational background, work role and years of work experience in education. A second version of the Background Questionnaire was developed in the fall of 1974 and requested information about the number and types of consulting experiences of the participants. Copies of both background questionnaires are included in Appendix B.

Final Questionnaire. This questionnaire was administered to all PETC-III trainees after training. It collected information regarding their judgments of the content, goals, activities and materials of PETC-III. It also assessed trainee satisfaction and trainees' perceptions of the relevance and utility of the training. Appendix C contains a copy of this questionnaire.

Initial Status Report. This instrument was developed during the fall of 1974 to aid evaluators in obtaining information from training teams on the nature of their client systems. The report form asks teams for background data on their client system including information on their organizational relationship to their client (internal/external) and the organizational context of the client group. There are also a series of questions asking for an initial diagnosis of the client system. The Initial Status Report was used in the data collection from the two Seattle PETC-III workshops. It was given to trainee teams at the conclusion of the first 4-day meeting. Members were asked to complete it during the interim period between the first and second workshop meetings and return it to NWREL evaluators at the second meeting. A copy of the Initial Status Report is included in Appendix D.

RESULTS OF THE EVALUATION

This section describes the empirical evidence gathered with the Final Questionnaire from trainees at the four pilot workshops. Information also is presented describing the PETC-III trainee teams and the client's systems with whom they provided consultation during their practicum experience.

The Final Questionnaire used in the evaluation of the PETC-III pilot workshops did not reach completion until mid-summer, 1975. As

a result, the procedure of administering this questionnaire at the
conclusion of the workshop's final meeting was not possible except at
the Seattle B site. Data were collected from 17 of the 18 participants
in this workshop. Participants in the three workshops conducted prior
to this date received a copy of the questionnaire in the mail,
accompanied by a letter requesting they respond to the questionnaire
and asking them to return it to NWREL in an enclosed prepaid, pre-
addressed envelope. Responses were received from 9 of the 12 Portland
participants, 8 of the 11 Minneapolis participants, and 7 of the 9
participants in the Seattle A workshop. Data presented in this report,
therefore, are from a total of 41 respondents, representing 82 percent
of the participants who went throught the PETC-III pilot training.[4]

Reactions to PETC-III Content, Materials,
Activities and Structure

Five questions on the Final Questionnaire asked participants to
assess the materials for clarity, interest and the demands they pre-
sented for original thinking, along with the technical quality of the

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[4]The data presented below are only from those questions on the Final
Questionnaire that used an anchored rating scale or some other type
of closed-ended format; 37 items of the 44-question instrument
utilized this format. Immediately following the Final Questionnaire
copy included in Appendix C is a listing of the close-ended questions
according to what aspect of the evaluation they pertain. Of the 7
open-ended questions, the responses to 5 are also included in
Appendix C. No analysis of these responses has been undertaken; they
are included in this report solely as descriptive data.

Another of these 7 questions, Question 33, provides information
that was to be used by the NWREL evaluators as part of a followup
study; the responses from this question are not included here since
they contain information that is not a concern of this report. The
remaining open-ended question, Question 2, was inadvertently omitted
in the final typing of this instrument and the oversight was not
caught prior to the administration of the questionnaire to the
participants.

content.[5] The results are shown in Table 2. Several questions also

ask participants to make judgments regarding the utility of the practice

exercise and the overall structure of the training experience. These

data are presented in Table 3, page 20. Respondents answered each

question on a 5-point or 6-point rating scale, with 1 representing the

negative end of the scale and 5 or 6 representing the positive end.[6]

Marks on either of the two high points were considered positive responses

for both scales and are reported accordingly in the discussion that

follows.

Discussion: Materials and Content. Responses were favorable to

the two questions on the appropriateness of the workshop content and its

clarity of presentation, with positive responses, 91 and 83 percent.

The clarity and ease of understanding of the materials themselves

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[5]The Final Questionnaire has several items that the program has used
for several years. For the sake of description, the items have been
clustered to form the following scales:
Content Quality: 5, 8, 9, 28a, 28c
Activities: 10, 11, 12, 14, 29a, 29b, 29c
Relevance: 3, 4, 13, 28b, 28d, 28e
Utility: 6, 7, 20
Goals and Objectives: 27a, 27b
Costs: 26
Preworkshop: 30a, 30b
Satisfaction: 1, 17, 22, 16
Need: 15, 34, 35

[6]The majority of the questions used the 6-point rating scale with
negative- and positive-value statements marking the poles. An even-
numbered scale was used for these questions since it does not provide
a midpoint for an "undecided" response, thus encouraging respondents
to take a value stance on each item. There were several questions
(27-30 and 34) for which the evaluators wished to assign value-
positions for each point on the scale. A 5-point breakdown seemed to
lend itself best to this format. The 5-point rating scales used for
Questions 27-30 had 5 signify the negative pole and 1 serve as the
positive extreme. However, in presenting the data from these questions,
the number values of the scales have been reversed to provide uniformity
in the tables and discussion.

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Table 2

Participant Responses Regarding Quality and
Efficacy of Materials and Content

Question		Scale						Total	
		Low 1	2	3	4	5	High 6	N	X̄
Question 28A[a]									
Appropriateness for your	f[b]		1	3	14	23		41	4.44[d]
experience and understanding	%[c]		2.2	9.9	9.1	57			
Excellent (High)									
vs.									
Unsatisfactory (Low)									
Question 28C[a]									
Clarity of presentation	f		4	3	18	16		41	4.12[d]
and definition	%		9.9	9.0	83	39			
Excellent (High)									
vs.									
Unsatisfactory (Low)									
Question 5[e]									
Clear, concise, under-	f		1	7	10	16	7	41	4.51
standable (High)	%		2.0	9.8	8.0	2.6	17		
vs.									
Hard to understand, complex,									
full of "jargon" (Low)									
Question 8[e]									
Material maintained my	f		1		5	17	18	41	5.24
interest (High)	%		2.2		3.9	2.6	44		
vs.									
Material failed to									
interest me (Low)									
Question 9[e]									
Demanded much original	f		1	2	13	12	13	41	4.83
thinking (High)	%		2.0	3.9	9.8	3.0	32		
vs.									
Demanded no original									
thinking (Low)									

[a]Question 28: Please rate the workshop content: Skills, concepts, principles
and values for:
[b]f = Frequency.
[c]% = Cumulative Percentage.
[d]Question 28 uses only a 5-point scale.
[e]Questions 5, 8 and 9: Think for a moment about the informational materials,
practice exercises and methods used in this workshop. All in all, how would
you rate them?

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Table 3

Participant Responses Regarding Quality and Efficacy of Activities and Structure

Question		Low 1	2	3	4	5	High 6	N	$\bar{x}$
Question 10[a] Practice exercises were of great value (High) vs. Practice exercises were of little or no value (Low)	f[b] %[c]		1 100	1 98	5 96	18 64	16 39	41	5.15
Question 29A[d] Appropriateness for learning to be a consultant Excellent (High) vs. Unsatisfactory (Low)	f %		1 100	4 98	14 88	21 55		40[e]	4.38[f]
Question 29B[d] Practical usefulness in learning consultant skills Excellent (High) vs. Unsatisfactory (Low)	f %		3 100	3 93	11 86	24 59		41	4.37[f]
Question 11[a] Session time was well used (High) vs. Time in the sessions was wasted (Low)	f %		3 100	1 93	5 91	14 79	18 55	41	5.05
Question 29C[d] Efficient use of time Excellent (High) vs. Unsatisfactory (Low)	f %	1 100	3 98	4 91	20 81	13 32		41	4.00[f]
Question 14[a] Allowed time for reflection about self and personal growth (High) vs. Did not allow time for reflection about self and personal growth (Low)	f %	1 100	1 98	2 96	8 91	14 71	15 37	41	4.90
Question 12[a] Structure useful, promoted learning (High) vs. Too structured, blocked learning (Low)	f %		1 100	2 98	8 93	16 73	14 34	41	4.95

[a] Questions 10, 11, 12 and 14: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?
[b] f = Frequency.
[c] % = Cumulative Percentage.
[d] Question 29: Please rate the workshop methods/strategies/procedures for:
[e] One participant did not respond to this question.
[f] Question 29 uses only a 5-point scale.

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received an appreciably lower rating, with but 56 percent positive response. For the most part, participants reported that the materials succeeded in maintaining their interest—86 percent responding positively. They did not, however, report as positively about the demand of the materials for original thinking; only 61 percent responded positively to this question.

It would appear that PETC-III trainees during the pilot workshop trials considered the materials to be stimulating and appropriate for their level of comprehension. However, the clarity of the materials was not as favorably viewed.

Discussion: Activities and Structure. There were seven questions relating to the activities and structure of the training experience. One question asked the participants to rate the value of the practice exercises, to which 84 percent responded positively. There was an equally favorable response to the two questions directed at the appropriateness and practical usefulness of the PETC-III training strategies for learning consulting skills, with a positive response of 88 and 86 percent, respectively. Finally, four questions related to the usefulness of the structure and various aspects of the way session time was used and its effectiveness. The same use of time at the PETC-III meetings was also viewed in a favorable light, with positive responses of 79 and 81 percent to the two questions on this topic. Response to the more specific question of whether sufficient time was allowed for reflection on self and personal growth was slightly less favorable with only 71 percent positive response. The usefulness of the structure received a similar positive rating of 73 percent.

These data seem to reveal a quite favorable response by participants regarding the value and usefulness of the activities and structure of the PETC-III training program.

Perceptions of Relevance and Utility of PETC-III

Participants were asked several questions about the relevance of the PETC-III training and the usefulness of the system's content.

Discussion: Relevance. Table 4 presents the results of the questions on the relevance of the system's content. To the question on the importance of the issues dealt with in PETC-III, there was a positive response of 85 percent. Another question asked participants to judge the workshop's content for parsimony and how well it minimized on extraneous material, to which 79 percent responded positively. Two other questions asked participants to rate the materials and methods on their ability to provide new insights in general, and into the trainees' own personal style. These produced positive responses of 83 and 81 percent. The two questions which asked specifically for the participants' perceptions of the relevance and practical significance of the workshop content for learning consulting skills received the most favorable response. There was a positive response of 88 percent on practical significance and 95 percent on relevance.

One question reflected on the relevance of the prerequisite workshops for PETC-III by asking participants if they believed the time commitments and prerequisites to be excessive. These data are presented in Table 5, page 24, indicating that 78 percent considered the prerequisites to be demanding but necessary.

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Table 4

Participant Responses Regarding Perceived
Relevance of System's Content

Question		Scale Low 1	2	3	4	5	High 6	Total N	$\bar{x}$
Question 4[a]									
Spoke to important issues,	f[b]				6	13	22	41	5.39
vital concerns (High)	%[c]				177	55	53		
vs.									
Missed the important issues,									
vital concerns (Low)									
Question 28D[d]									
Parsimony (little or no	f		3	5	16	14		38[e]	4.08[f]
unimportant or unuseful	%		177	92	79	37			
material)									
Excellent (High)									
vs.									
Unsatisfactory (Low)									
Question 3[a]									
Offered new insights, new	f			1	6	14	20	41	5.29
ways of viewing old problems	%			177	93	73	49		
(High)									
vs.									
Only restated or provided									
what I already knew (Low)									
Question 13[a]									
Gained new insights about my	f				8	10	29	41	5.29
style of consulting (High)	%				177	71	49		
vs.									
Learned nothing new about my									
style of consulting (Low)									
Question 28E[d]									
Practical significance for	f		2	3	14	22		41	4.37[f]
successful consulting	%		177	95	79	54			
Excellent (High)									
vs.									
Unsatisfactory (Low)									
Question 28B[d]									
Relevance for learning to	f			2	13	20		41	4.66[f]
be a consultant	%			100	95	72			
Excellent (High)									
vs.									
Unsatisfactory (Low)									

[a]Questions 3, 4 and 13: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?

[b]f = Frequency.

[c]% = Cumulative Percentage.

[d]Question 28: Please rate the workshop content: Skills, concepts, principles and values for:

[e]Three participants did not respond to this question.

[f]Question 28 uses only a 5-point scale.

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Table 5

Participant Responses Regarding Need
for Prerequisites to FETC-III

Question	N[a]	Percent
Question 32[b]		
Yes, definitely; could be reduced somewhat	6	15
No, they are demanding but necessary	31	78
No strong opinion either way	3	7

[a] One participant did not respond to this question.
[b] Question 32: Do you think time commitments and prerequisites for FETC-III are excessive?

Discussion: Utility. Three questions were asked concerning the utility of learnings in FETC-III and the responses are presented in Table 6. There was a moderately favorable response to the two questions asking if the training provided real "how to" help (68 percent positive response) and immediately usable learnings (78 percent positive response). To the question asking the participants how much they intended to use the workshop materials and learnings, there was a higher positive response of 81 percent.

It would appear, in general, that FETC-III is seen by workshop participants as relevant and useful to their educational concerns.

Assessment of Goals and Objectives,
Costs, and Pretraining Materials

Participants at the pilot workshops were asked to respond to several questions relating to the goals and objectives of the training program, costs incurred, cost-benefit potential and the effectiveness of the pretraining materials.

Table 6

Participant Responses Regarding Perceived
~~~~~~~ of System's Content

Question		Scale						Total	
		Low 1	2	3	4	5	High 6	N	X̄
Question 7[a]									
Provided real "how to"	f[b]		2	1	10	14	14	41	4.90
help for my actual group	%[c]	...	9%	9%	58	34			
work (High)									
vs.									
Little "how to" help for									
my actual group work (Low)									
Question 6[a]									
Ideas, skills, methods can	f		3	2	4	17	15	41	4.95
be used immediately under	%	...	93	98	78	37			
existing conditions (High)									
vs.									
Usage would require changes									
in conditions that I have no									
control over (Low)									
Question 20[d]									
Extensively (High)	f		1	2	5	8	25	41	5.32
vs.	%	...	98	93	81	61			
Not at all (Low)									

[a] Questions 6 and 7: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?
[b] f = Frequency.
[c] % = Cumulative Percentage.
[d] Question 20: In all honesty, how much do you plan to use the ideas, skills and/or materials presented in this workshop as an integral part of your work?

Discussion: Goals and Objectives. Two questions asked partici-

pants to rate the goals and objectives of the PETC-III training program

for their clarity and significance. These questions used a 5-point

rating scale, with responses at points 4 and 5 indicating a positive

opinion. Results are shown in Table 7. Of the participants, 88 percent

responded positively to the question on clarity; 95 percent believed

the goals and objectives to be significant and important. These data

show that, for the most part, the workshop participants considered the

goals and objectives of PETC-III to be clearly stated and of importance

to the educational community.

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Table 7

Participant Responses Regarding the Goals and Objectives

Question		Scale					Total	
		Low 1	2	3	4	High 5	N	$\overline{X}$
Question 27A[a]								
Clarity								
Excellent (High)	f[b]			5	23	13	41	4.20
vs.	C%[c]			100	89	32		
Unsatisfactory (Low)								
Question 27B[a]								
Significance/Importance	f			2	18	21	41	4.46
Excellent (High)	C%			100	95	51		
vs.								
Unsatisfactory (Low)								

[a]Question 27: Please rate the *goals and objectives* for:
[b]f = Frequency.
[c]C% = Cumulative Percentage.

Discussion: Costs. To assess the feasibility and reasonableness of the costs of participating in the PETC-III training program, NWREL evaluators asked participants on the Final Questionnaire to note the expenses they incurred out of their own pockets and the potential income they lost in attending the meetings. Participants were then asked to consider these costs as well as the time and energy spent, and to indicate what they thought of the workshop expenses in light of what they got out of the training. Data are presented in Tables 8 and 9.

There are two general limitations to the presentation of this out-of-pocket expense data as accurate indicators of the cost of participation in a PETC-III workshop. Since these workshops were part of the developmental process of PETC-III and thus funded by the NWREL's contract with the National Institute of Education, the training was provided at no cost to the participants; out-of-pocket costs were only for incidental expenses. Too, participation in PETC-III requires

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Table 8

Participant Expenses

Question	Response		Respondents Stating Special Amount		Range of Expenses	Mean Expense[a]
	N	Percent	N	Percent		
Question 24[b]						
Travel Costs	25	61	22	54	$10-2000	$218.86
Room and Board	11	27	9	22	$10-560	$188.11
Tuition	12	29	12	29	$180	$180.00
Other	17	41	14	34	$5-1000	$94.79
Question 25[c]	8	20	8	20	$170-4000	$1046.25

[a]Mean expense was tabulated by totaling the amount of expenses in a given category and dividing by that number of participants who stated a specified amount of expense.

[b]Question 24: Which of the following costs did you incur out of your pocket in order to attend this workshop? Please estimate the amount.

[c]Question 25: Did you give up potential income in order to attend (e.g., other jobs)? If yes, please give an estimate of how much.

Table 9

Participant Assessment of Value
for Costs Incurred

Question	N[a]	Percent
Question 26[b]		
Costs were too great, etc.	2	5
Costs were about right, etc.	5	13
Costs were small, etc.	32	82

[a]Two participants did not respond to this question.

[b]Question 26: Considering the costs (e.g., monetary, time, etc.) that you incurred in order to attend this workshop, how do you feel?

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completion of six prerequisite workshops with the attendant costs of
these activities. The other factor that limits the generalizability of
this data is that the respondents constituted less than 35 percent of
the total number of participants in three of the four categories of
expenses. A nonresponse may mean that the participant had no expenses
in that category, that the expenses incurred were negligible and not
worth mentioning, or that there were continual expenses that would
require too much effort to figure out. Given the minimal response to
this question, the data should not be considered as representative.
This last disclaimer applies also to the data from the question on
income lost due to workshop participation to which only eight partici-
pants responded. The data from these two questions are presented here
simply as descriptive information about this particular population.

To the question on expenses incurred out of their own pockets, 25
participants responded that they had had travel expenses; 22 participants
(54 percent) provided information on the amount of their travel expenses.
Travel expenses ranged from $10 to $2,000, with a mean travel expense of
$218.86 for these 22 respondents. Three of these participants lived in
a state other than that of their workshop site and thus incurred large
air travel expenses. Travel expenses for the other 19 participants,
who lived in the area of the workshop site, ranged from $10 to $100,
with a mean expense of $43.15 (these data are not included in Table 8).

Eleven participants indicated having had expenses in the "room and
board" category. Of these, 9 respondents (22 percent) listed specific
costs, which ranged from $10 to $560; the mean expense for these 9
respondents was $188.11. In addition to the general disclaimers
mentioned earlier, there is another reason for this figure to not be
considered an accurate indicator of the room and board expenses a

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prospective participant can expect to incur: it has mixed data both from out-of-town participants who had hotel expenses, and from local participants with the lesser meals representing the only expense data.

Some people elected to receive graduate credit from United States International University in San Diego, California, for their participation in this training. Therefore, 12 persons (29 percent) opted to pay the $180 tuition fee.

To the "other expenses" category, there were 17 responses, with 14 of the participants (34 percent) giving specific amounts of expenses incurred. These expenses ranged from $5 to $1,000, with a mean expense of $94.79. The person who had $1,000 of expenses in this category was a Seattle workshop participant from California who included some of his travel expenses in this category. The expenses for the other 13 participants ranged from $5 to $50, with a mean expense of $25.15 (these data are not shown in Table 8). The most common expenses in the "other" category were for books and food.

Eighty percent of the participants indicated that they had not lost any personal income due to their attending the PETC-III workshop. The information provided by the 8 particpants (20 percent) who did lose income shows a range of income lost from $170 to $4,000, with a mean loss of $1,046.25.

Ninety-five percent of the participants thought the costs were small or about right compared to what they had received from the training. In looking at the individual data (not shown in Table 9) it was determined that the 5 percent who responded that the costs were too great represented two persons from the midwestern United States who attended the five meetings at one of the Seattle, Washington, workshops and who had sustained extreme travel expenses.

Discussion: Pretraining Materials. Prior to the first 4-day

meeting, workshop participants received descriptive materials related

to the objectives, content and process of the FEIC-III training program

and instructions for carrying out some preliminary consulting activities

involving entry into the client system. The two Seattle workshops were

also issued a FEIC-III central ideas book with a designated reading

assignment. Two questions on the Final Questionnaire inquired about how

well these materials and activities provided the participants with

information and accurate expectations about the nature of the workshop.

The information is summarized in Table 10.

Table 10

Participant Responses Regarding
Preworkshop Orientation Materials and Activities

Question		Low 1	2	3	4	High 5	N	$\bar{X}$
				Scale			**Total**	
Question 30A[a]							40	3.78
How successfully they	f[b]	1	5	9	12	13		
provided you with	C%[c]	100	98	86	63	33		
information you needed								
Excellent (High)								
vs.								
Unsatisfactory (Low)								
Question 30B[a]							41	3.83
How successfully they	f		6	9	12	14		
gave you clear and correct	C%		100	85	63	34		
expectations about the								
nature of the workshop								
Excellent (High)								
vs.								
Unsatisfactory (Low)								

[a]Question 30: Please rate the preworkshop orientation materials and
activities for:
[b]f = Frequency.
[c]C% = Cumulative Percentage.

The data from these two questions suggest that the pretraining

materials did not completely meet the informational needs of the parti-

cipants. Both questions received only a 63 percent positive response.

An examination of the data by workshop (not shown in Table 10) reveals that participants in the two Seattle workshops responded more favorably than the overall mean on both items, particularly to the question on provision of sufficient information. This may be due to their having access to the central ideas book as a part of their pretraining materials.

Satisfaction with Overall Training

Two questions on the Final Questionnaire touched on the participant's judgments about the worth of their consulting experience and of the training experience as a whole. A third question asked them to compare the PETC-III workshop with other professional educational courses. A final question asked how well the workshop had met their expectations. The results are presented in Table 11.

Discussion. There was a high favorable response to all four questions, particularly the one concerning the value of the overall training experience to which 93 percent responded positively, and the one comparing PETC-III to previous professional educational courses which received a 94 percent favorable comparison. Of the participants responding, 83 percent reported highly about their consulting experience and 81 percent reported that the workshop exceeded their expectations.

It would seem from these data that participants in the pilot trials thought PETC-III more than fulfilled their expectations and provided them with a valuable consulting practicum and a worthwhile training experience and these compared favorably with prior educational experiences.

Perceptions of the Need for OD Consulting
Abilities and the Ability of PETC-III to
Fulfill This Need

In order to gain information on the needs in the educational community for internal organizational development capabilities, one

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Table 11

Participant Responses Regarding
Satisfaction with Overall Training

Question		Low 1	2	3	4	5	High 6	N	$\bar{X}$
					Scale				**Total**
Question 22[a]									
Extremely worthwhile (High)	f[b]			1	2	9	29	41	5.61
vs.	%[c]			100	98	93	71		
Not very worthwhile (Low)									
Question 16[d]									
Very high (High)	f		1	1	1	6	32	41	5.53
vs.	%		100	98	96	94	73		
Very low (Low)									
Question 17[e]									
Extremely valuable, worth- while experience. Much learning accomplished (High)	f			3	4	13	21	41	5.27
vs.	%			100	93	83	51		
Little value, no learning accomplished (Low)									
Question 1[f]									
Has exceeded my expectations (High)	f		1	2	5	22	11	41	4.98
vs.	%		100	98	93	81	27		
Has not come up to my expectations (Low)									

[a]Question 22: Now that the workshop/course is over, how would you sum up the experience?

[b]f = Frequency.

[c]% = Cumulative Percentage.

[d]Question 16: How would you rate this workshop compared to other professional education courses you have taken?

[e]Question 17: In an overall assessment of your consulting experience, was it:

[f]Question 1: To what extent has this workshop fulfilled your expectations about what you personally might get out of it?

question on the Final Questionnaire prob__ he participants' perceptions of such a need. Two further questions asked the participants how well they thought the PETC-III training would meet this need. The results are found in Table 12.

Discussion. The question on the need for educators with OD con- sulting abilities provided the respondents with four choices ranging from "definitely no need" to "definitely strong need." There was com- plete unanimity among the respondents on this question, with 100 percent

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Table 12

Participant Responses Regarding the Need for CD
Consulting Abilities and the Ability of the PETC-III
Training Program to Meet This Need

Question		Scale						Total	
		Low 1	2	3	4	5	High 6	N	$\bar{x}$
Question 34[a]									
Definitely strong need	f[b]					41		41	5.00[d]
(High)	x[c]					100			
vs.									
No opinion (Low)									
Question 35[e]									
Excellent (High)	f		1	3	8	29		41	4.59[d]
vs.	x		100	98	91	71			
None (Low)									
Question 15[f]									
High Potential (High)	f			1	4	14	22	41	5.39
vs.	x			100	98	88	54		
Low Potential (Low)									

[a]Question 34: Do you believe there is a need in the educational community for
 educators with organizational development consulting abilities?
[b]f = Frequency.
[c]x = Cumulative Percentage.
[d]Questions 34 and 35 use only a 5-point scale.
[e]Question 35: Please rate the potential of PETC-III for meeting such a need.
[f]Question 15: How would you rate it in terms of its potential for organizational
 improvement?

indicating a definite strong need. The questions regarding the ability
of PETC-III to meet such a need also received a high favorable response
with 91 and 88 percent of the participants reporting positively.

Based on these data, participants overwhelmingly perceived a strong
need in the educational community for internal organizational develop-
ment capabilities. In addition, participants believe strongly in
PETC-III's ability to meet this need.

Background on Consultant Teams and
Their Client Systems

Through the use of the Initial Status Report, descriptive informa-
tion was collected from the PETC-III trainees on the composition of the
trainee teams and their client systems, which part of an organization

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their client system represented and the relationship of members of the
trainee team to their client system. This information is presented, by
workshop, in Tables 13, 14, 15 and 16, pages 35-38. Table 17, page 39,
provides a summary of this information.

Discussion. As described previously, a total of 50 trainees com-
pleted the FITT-III training program. They provided consultation to 26
client systems. The FITT-III strategies suggest that consulting teams
consist of two persons, and sixteen of the consulting groups (nearly
two-thirds of the total) were 2-person teams. The other trainees were
either in 3-person teams or acted as individual consultants.

Since the purpose of the FITC-III training program is to provide
internal organizational development capabilities in the educational
community, it was considered preferable that the consulting practicums
reflect this orientation. In over three-quarters of the consultant-
client relationships, one or more of the members of the consulting team
was also a member of the client system's organization. A like percentage
of the client systems were part of the educational community. They were
predominantly public school staffs and administrators and central office
personnel, but also included such groups as an alternative school system,
an advisory body in a university library system and university students
in an independent doctoral program. Five client systems were social
organizations, such as a gay rights committee in Minneapolis and an
educational research and development laboratory. The remaining client
system was from business. In 12 of the 26 client systems, the specific
organizational subgroup the consultants worked with represented adminis-
tration. A nonadministrative subgroup was represented in eight of the
client systems, while six of the client groups consisted of an entire
organization.

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Table 13

Summary Information of ESEA-III Consultant Teams and Their Client Systems

Portland, Oregon
April - November 1974

Team/Individual	Consultant Teams			Client System	
	Sex	Position	Relationship to Client System	Client System	Organizational Context
Team	M	Evaluator	Internal	Educational research and development laboratory	One semiautonomous work unit
	F	Associate Coordinator Field Relations	Internal		
	M	Director Field Relations	Internal		
Team	F	Administrator	Internal	High school	Primarily the principal and vice principal
	F	Consultant	External		
Individual Consultant	M	Consultant	Internal	Middle school	One project with departmental instructional team; one project with entire staff
Team	M	Administrator	Internal	Church	Coordinator of social service programs
	M	Consultant	External		
Team	M	Coordinator	External	K-8 school	Faculty of upper grades
	F	Administrator	External		
Team	M	Administrator	Internal	A public school district's area central office	Administrative staff
	F	Supervisor	Internal		

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Table 14

Summary Information of Health Consultant Teams and Their Client Systems

Minneapolis, Minnesota
May – December 1974

Consultant Teams				Client System	
Team/Individual	Sex	Position	Relationship to Client System	Client System	Organizational Context
Team	M	Social Work-Consultant	External	Nursing home	Administrator of home and director of nursing
	M	Engineering Technician	External		
Team	M	Administrator	External	State Department of Education	Administrator of personnel and staff development
	M	N/A	External		
Individual Consultant	M	Consultant-Private	Internal	Small private consulting firm	Entire staff
Team	M	Facilitator-Small Groups Religion	External	High school	Administrative committee
	M	School Social Worker	Internal		
Team	M	Furniture Manufacturer	External	A minority rights committee	Executive director and board of directors
	F	Consultant-Media Specialist	External		
	M	Free-lance Consultant	External		
Individual Consultant	M	Teacher	Internal	Alternative school system	Entire school

Table 15

Summary Information of PETC-III Consultant Teams and Their Client Systems

Seattle, Washington (A)
November 1974 - June 1975

Team/Individual	Consultant Team		Relationship to Client System	Client System	
	Sex	Position		Client System	Organizational Context
Individual Consultant	M	Teacher	Internal	College	College president, vice president for academic affairs, and two committees of the college's General Education Program
Team	F	Psychologist	Internal	Public school district	Personnel of the Instructional Services division
	M	Administrator	Internal		
Individual Consultant	M	Teacher	Internal	Commercial business	Coordinator of sales training program for Ross Lab
Team	F	Administrator	Intern.	Public school district	Twelve-person administrative team for district, including superintendent
	M	Director of Organizational Development for State Department of Education	External		
Team	F	Teacher/Counselor	External	Public school community action group	Community action group of nine school principals and nine Parent-Teacher-Student Association presidents in a sub-district of Seattle Public Schools
	F	School Psychologist	External		
Individual Consultant	M	School Psychologist	Internal	A "university-without-walls" type doctoral program	The students involved in program

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Table 10

Summary Information of [l,,'ll' Consultant Teams and Their Client Systems

Seattle, Washington (H)
February – July 1975

| Team/Individual | Consultant Teams | | | Client System | |
	Sex	Position	Relationship to Client System	Client System	Organizational Context
Team	F	School Psychologist	External	School counselor, project director	High school staff person
	F	Psychologist	External		
	F	Counselor (Adult)	External		
Team	M	School Psychologist	Internal	District student relations department	Subdepartment of district's Department of Curriculum and Special Services
	M	Psychologist/Consultant	Internal		
	F	School Psychologist	Internal		
Team	F	Counselor	Internal	High school	Decision-making organization of high school
	F	Administrator	Internal		
Team	M	Administrator	Internal	High school Instructional council	Council serves in advisory position to principal
	F	Counselor	Internal		
Team	F	Counselor	External	University library system	Advisory and coordinating body for undergraduate and health sciences libraries
	F	Librarian	Internal		
Team	M	Activity Coordinator	Internal	Regional administration	Subdistrict administration
	M	Program Coordinator	Internal		
Team	M	Department Chairman	Internal	Human relations committee	Subgroup of the public schools human relations task force
	M	Counselor	Internal		
Team	M	Assistant Superintendent	Internal	Public school district	Working with the management function of their own roles as superintendent and assistant superintendent
	M	Superintendent	Internal		

Table 17

Summary Data of 1974-1977 Consultant Teams and Their Client System

Characteristics	Portland		Minneapolis		Seattle A		Seattle B		Total	
	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent
Number of participants	12	24	12	22	9	18	18	36	50	100
Number of teams	6	23	6	23	6	23	8	31	26	100
Number of consultants on teams:										
Individual	1	17	2	33	3	50	0	0	6	23
Two-person teams	4	66	3	50	3	50	6	75	16	62
Three-person teams	1	17	1	17	0	0	2	25	4	15
Relationship of consultant to client system:										
Internal	3	50	2	33	4	66	6	75	15	58
External	1	17	3	50	1	17	1	12	6	23
Internal/external combination	2	33	1	17	1	17	1	12	5	19
Client types:										
Educational	4	67	3	50	5	83	8	100	20	77
Business	0	0	0	0	1	17	0	0	1	4
Social organizations	2	33	3	50	0	0	0	0	5	19
Organizational context:										
Administration	3	50	4	67	2	33	3	38	12	46
Organizational subgroup	1	17	0	0	2	33	5	62	8	31
Whole organization	2	33	2	33	2	33	0	0	6	23

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Contained in this chapter is a description of the external expert review. The focus of the evaluation in this investigation is presented, as is a description of the selection process of members of the Review Board. Then follows a summary of the reviewers' written critiques.

FOCUS OF THE EVALUATION

This particular evaluation activity[7] was designed to obtain information from impartial outside reviewers to answer the following evaluation question:

> From the perspective of impartial outside reviewers, are the goals, content and training strategies for PETC-III adequate in terms of their significance, completeness, feasibility, social fairness, etc.?

THE SELECTION OF REVIEWERS

The reviewers of PETC were chosen by the nominations of their peers to be persons experienced and competent in school intervention and consultation. The four reviewers selected were Gene Mulcahy, Trustee of the Knox Foundation and former Director of Shanti School, Hartford, Connecticut; Ann Burr, elementary school teacher and member of the Cadre of Organizational Communication Consultants, Eugene Public Schools, Eugene, Oregon; Bunyan Bryant, Assistant Professor, School of Natural Resources, University of Michigan and former member of the Educational Change Team, Ann Arbor, Michigan; and Bonard Wilson, consultant with the Leadership Institute of Spokane and former UNESCO Consultant to the Ministry of Education, Indonesia, Rhodesia, Panama and the Philippines.

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[7]The external review for PETC-III was conducted in conjunction with reviews for PETC-I and PETC-II. In addition to being more cost effective, the combined review allowed for judgment about the sequential and cumulative aspects of the PETC series.

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The Review Board was chosen through the nominations of 22 people
involved in educational change. To maximize the different possible
networks of individuals involved in school intervention, a stratified
sample of nominators was selected from the following sources:
(a) individuals having had organizational development experience as
listed in *Organization Development in Schools* (Schmuck and Miles, 1970);
(b) individuals listed in the directory of the International Association
of Applied Social Scientists; and (c) authors listed in the *Bibliography
on Organizational Change in Schools* (Runkel, 1974). The individuals
compiled from these lists were placed on a matrix of four regions in
the United States and a matrix of four institutional affiliations
(university, research organization, educational affiliation or private
consultant). An individual was randomly chosen from each cell and
contacted by mail explaining the purpose of the Review Board. They were
then contacted by telephone to nominate in ranking order other individ-
uals to serve on the Review Board. Five points were assigned their
first choice, four points their second choice, and so on. The object
was to select those individuals with the highest scores to be on the
PETC Review Board.

There were 98 different nominations by the 22 nominators. Only
three individuals received recommendations from two or more people;
those were Matthew Miles, Richard Schmuck and Mark Chesler. Miles and
Schmuck had been eliminated earlier as potential reviewers because of
earlier or current associations with the PETC Program and Chesler was
one of the nominators. Twenty-six individuals were the first choice of
nominators (some nominators had more than one first choice). Since
the objective of selecting individuals who had been repeatedly nominated

by their peers was not met, the Review Board was chosen from these
26 names to include individuals who met the following criteria:

1. An individual with a training and development focus who
   had worked with instructional systems in education.
   Bonard Wilson met this criterion.

2. An individual with an educational focus who had also
   worked in training and school consultation. Ann Burr
   and Gene Mulcahy met this criterion; the former working
   within the public sector, the latter working in the
   private sector of alternative schools.

3. An individual with a broad systems change perspective
   who had worked in schools. Bunyan Bryant met this
   criterion.

4. In addition, there was a concerted effort to have the
   Review Board composed of individuals of differing ages,
   ethnicity and sexes.

THE FINDINGS OF THE REVIEWERS

A 4-member Review Board met October 20-23, 1975, at the Northwest
Regional Educational Laboratory in Portland. Participating on the
Review Board were Bunyan Bryant, Ann Burr, Gene Mulcahy and Bonard
Wilson, whose backgrounds have been discussed previously. The purpose
of this 4-day conference was to facilitate the reviewers' preparation
of their written summative reports. They were provided information
about the training materials and were given an opportunity to seek
clarification on issues they identified. During the conference,
presentations were made by developers and evaluators of the Improving
Teaching Competencies Program. Several graduates of PETC took part in
an information-sharing session. Work sessions also were provided to
enable the reviewers to confer with each other and to compose their
individual written critiques. The agenda and a more detailed descrip-
tion of the activities during the four days are presented in Appendix E.

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Reviewers were provided with a series of questions, included in
Appendix E, to serve as a guideline for their written critiques. The
questions concerned the merit and appropriateness of the rationale and
goals, content and training procedures of the PETC series, and dealt
with issues of the role of the trainer and the identification of target
populations. The following section consists of a summary of the four
written reviews. The complete text can be found in Appendix E.

The Rationale and Goals of the PETC Series

Clarity. Three of the reviewers considered the rationale and goals
for the PETC series to be "very clearly presented...and well defined."
Wilson, however, believed that the goals of the program lack specificity
due to being couched in instructional terms rather than behavioral terms.

Logic. All reviewers agreed that the conceptual logic of the
program was sound and consistent. There was a belief among the reviewers,
most succinctly expressed by Wilson, that perhaps the PETC series was
too logically ordered, to the point where it might not be flexible
enough to be adapted to a variety of learner needs and situations.

Social Significance. The goals of providing educators with skills
for understanding and working with interpersonal relationships, group
process and organizational systems for the purpose of effecting
humanitarian change in the educational community were seen by all the
reviewers as having a great deal of social significance.

There were, however, several concerns raised by each of the
reviewers regarding issues of social justice that are inherent in the
purpose and implementation of the PETC training programs. There were
four principle concerns: the implicit parameters of the target popula-
tions, the neutral value stance of PETC, sexist and racist implications

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in the materials and potential misuse of learnings by PETC graduates.
These concerns will be more fully discussed later in this section.

Claims and Disclaimers. Without exception, the reviewers thought
the claims and disclaimers made for the PETC training program were
clearly and explicitly stated. Mulcahy further commented that he
considered the claims to be understated, that "the potential and actual,
in the package, transcends the claims made for it." Wilson indicated
that some disclaimers had been given only verbally and needed to be
included in the written materials.

Target Populations

The reviewers agreed that the PETC target populations were clearly
identified. They all took issue, however, with the parameters set on
these target populations. Criteria for particiation--being in a
manager role, having sufficient time and financial resources--promote
a highly exclusive selection process that results in a tendency toward
white, male, middle-class leaders. "There is no consideration in the
program for the fact that the appropriate organizational development
consultant in a situation may be a student, or a black parent, or a
member of the community not skilled in the jargon and concepts of the
educationist." The reviewers expressed a desire to see that access to
the training be provided for students, community members and all levels
of school personnel.

The Content of the PETC Series

According to Bryant, "...it is probably one of the best conceptual
and integrative organizational change and development pieces to date...
the PETC system was clearly integrated into a meaningful whole, inte-
grating skills and theoretical concepts, and activities that went from

simple to more complex." Burr, Mulcahy and Wilson stated similar opinions of the conceptual content of PETC. However, some shortcomings were noted, including the following.

Content Insufficiencies. There were recommendations from individual reviewers suggesting the addition of materials on alternative approaches to consulting, the process of moving from diagnosis to intervention and methods for working with oppressed groups. Burr and Wilson mentioned the absence of content in the affective areas, particularly in the context of working with a client. Said Wilson, "A consultant could graduate from this program and be unable to help clients deal with values and feelings."

Social Justice Concerns. Two concerns were voiced by the reviewers in regard to the presentation of the content and the neutral value stance assumed by the materials. The former concern related to sexist and racist implications. The use of sexist language (the teacher, she; the principal, he) was pointed out by all the reviewers. In addition, the settings of exercises were pointed out to reflect a white and middle-class orientation to the world.

The second concern involved the lack of any explicit value positions presented in the materials in regard to social justice issues in the educational community. Mulcahy remarked, "consideration of [the] social, ethical questions of reform and revolution is not forthcoming either in the rationale or the design of the program." Given the social inequities present in today's educational community and the perceived bias in the selection of PETC trainees, Bryant and Mulcahy commented on the possibility of PETC training being used to buttress existing conditions rather than to change them.

Time and Money. Although all reviewers agreed cost is a major

issue for all substantive organizational change strategies, it also

was introduced as a limitation of FETC.

Inflexibility of System. While on the one hand reviewers were

impressed with the system's conceptual integration and integrity, they

expressed a concern that the structure might impede trainee learning.

This question arose as a result of input from the FETC graduates who

acknowledged during the course of training they often were unsure why

certain concepts or exercises were introduced. The gestalt was

difficult to see until one had completed the entire package.

Overload of Materials. This was pointed out especially in regard

to FETC-III. The developers, however, had made changes in the timing

of content materials (mailed before and in between training sessions).

The training does maximize time, however, and there is a great deal of

cognitive input during a short time period.

.The Training Procedures of FETC and Role of the Trainer

Training Procedures. By and large, the reviewers considered the

training procedures to be appropriate. Wilson qualified his support by

again mentioning the training program's lack of attention to affective

learnings, for which he felt the training procedures very inadequate.

Role of the Trainer. The clarity and explicitness in the definition

of the trainer's role was viewed quite highly. It also was felt that

building the FETC-III trainer role of information-disseminator, a

behavior not included in the trainer roles for the other FETC training

programs, was appropriate in light of the extraordinary amount of con-

ceptual and theoretical material to be absorbed by the trainees. Wilson

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had a reservation about this extramanagerial role with regards to the

possible effects of trainer input "in the case of a trainer whose values

are not in line with the values underlying the program."

The subject of this chapter is the investigation carried out to identify training programs which offered an alternative experience to PETC-III. The focus of this evaluation activity is presented at the outset, followed by a description of the methods used in conducting the search. The chapter concludes with a comparative analysis of PETC-III with the identified alternatives.

EVALUATION FOCUS AND METHODS OF THE SEARCH

The alternatives search was an activity designed to answer the following evaluation question:

> What are the existing alternatives to PETC-III and how does PETC-III compare to these alternatives in terms of: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination?[3]

Initial activities of the search involved conducting an ERIC search; interviewing professionals in the field of organizational development, process consultation and group training; and consulting professional educational and organizational development journals and catalogues. By these means, a list of some 110 persons and/or institutions were identified who were doing work in areas similar to those in the PETC series.

A letter and questionnaire were sent to these people and organizations requesting their answers to a series of questions and soliciting related written materials produced by them. Copies of the letter and questionnaire can be found in Appendix F. Responses were received from slightly over 30 percent of those surveyed. Of these responses, 12

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[3]The alternatives search for PETC-III was conducted in conjunction with searches for PETC-I and PETC-II. This strategy was employed for reasons of cost-effectiveness.

training programs could be identified that appeared to be in some way comparable to one or more of the FITC programs. Telephone interviews were conducted with these respondents in cases where further descriptive information was needed.

LIMITATIONS ON ALTERNATIVES SEARCH

Due to the nature of the FITC training programs and to a shifting of focus caused by funding difficulties, there were a number of limitations to the search for and reporting of alternatives. The limitations fall into two areas:

Limitations on the scope of the search itself

Limitations on the comparative analysis of the training systems identified

Limitations in Scope

Since the FITC training programs are a process-oriented approach to consulting and organizational development, the search for alternatives was limited to identifying training opportunities with similar process orientations.

Requests for information were sent to 110 people and/or institutions; responses were received from only 35 people. This by no means represents an exhaustive study. That the search ended with this first stage of exploration was in great part due to a shifting of priorities to other activities when the program's impending loss of funding became known. Further strategies for the identification process were planned but not carried out. These included sending followup letters to nonrespondents from the group of 110 and a second stage of followup contacts by telephone. Also, further investigations in the literature and continued interviews with professionals in the field of process consultation and organizational

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development were planned; the identification of the 110 people was
the result of only a preliminary search.

Limitations in the Comparative Analysis

There are three principle issues:

1. _Disparity of Formats_. It is exceedingly difficult to
make a cogent comparison of FETC-III with a university
doctoral program or with a 3-day film-cassette and
discussion workshop, even when they all deal with OD
theory and have other subjects in common. Valid compari-
sons can be made of target populations, topics covered
and such tangibles as these, but not of the more abstract
characteristics such as cognitive and process outcomes
and costs which reflect varying travel expenses, and so on.

2. _Superficiality of the Data_. One can assume that a 3-day
workshop on OD theory is going to offer less than a 4-year
graduate program with an emphasis on OD theory. It is
much more difficult to note the differences between two
workshops of similar duration that claim to cover the same
issues and produce similar outcomes unless there is a
detailed description of content and process. The search
did not obtain detailed descriptions; it would have
required a much greater expenditure of energy than was
available.

3. _Cost_. Since the Northwest Regional Educational Laboratory
does not charge participants for the training provided in
field test workshops, a viable cost comparison and cost-
effectiveness analysis was not possible.

FINDINGS OF THE ALTERNATIVES SEARCH

The following is a comparative anlaysis of the 12 alternatives and
the FETC training program. The characteristics of each training program
have been grouped in six major areas: target population, content pro-
vided in the training, workshop procedures and strategies, expected
outcomes, trainers and dissemination. Abstracts outlining this informa-
tion for each system can be found in Appendix F. Also included in
Appendix F is an outline of the FETC training programs which describes
their characteristics in greater depth.

<u>Target Population</u>

Three of the twelve alternative programs are described as being specifically for educators in roles comparable to those for which the FITTs are intended. One program is for premaster's degree graduate students. Four programs are described as applicable across fields, specifically including education. Three programs are described as designed for "behavioral science professionals" with no specific reference to education. One program is said to "tend toward business and industry."

<u>Content Provided in the Training</u>

Two of the twelve alternative programs provide some skills training similar to FITT-I: Skills Trainers, but none appear to provide training explicitly in the use of skills training exercises. Six are concerned with planned change, small group work and consultation similar to the content of FITT-II: Consulting. Some of these seem to include content similar to some of the prerequisite systems for the FITT sequence. There is some emphasis on data gathering and use such as in the Research Utilizing Problem Solving system. Some include communications and at least one includes material on conflict. Six of the alternative systems are concerned with organizational theory and organizational development practice. One is solely concerned with a matrix model for conceiving diagnosis and intervention.

While the areas of content focus in the alternative systems vary, they appear to be generally similar to the FITTs and their prerequisites. There does seem to be wide variability in the specific content offered. Quite a bit of the content of FITT-I and FITT-III seems to be exclusive. A fair amount of material in many of the alternatives also sounds

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exclusive. Some alternatives sound complementary to the FETCs while
others might serve as reasonable substitutes for some prerequisites or
for FETC-II. In any particular case, closer examination of the content
and consideration of the training procedures and strategies would need
to be carried out to explicate the distinctions.

Workshop Procedures and Strategies

Procedures and strategies for the 12 alternative systems vary
widely. They range from a totally preplanned structure at one extreme
to a design that was spontaneously created as the workshop progressed
at the other. As a sequence, the FETCs also include structural variety,
moving from high structure in FETC-I to a fair degree of openness within
experiential exercises and the practica in FETC-II and FETC-III. One of
the alternatives simply provides didactic input on film, plus written
questions to guide large group discussions. Several alternative
systems seem to rely heavily on trainer expertise for content as well
as process guidance. Others seem more like the FETCs in using prepared
materials for content expertise. Most are described as placing emphasis
on some forms of experiential learning. Four emphasize small groups or
teams similar to the FETCs. Five stress use of case studies. One has
a practicum like FETC-II. One has a back-home project which sounds more
like the *Research Utilizing Problem Solving* prerequisite than the OD
effort of FETC-III.

Expected Outcomes

Materials concerning three of the alternative systems do not
include any statements concerning expected outcomes. A fourth is
presented as an introduction to the field of OD. It offers expectations
of cognitive clarity and an increased basis for making decisions about
OD. The expected outcomes of a fifth system depend on how the

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participant makeup influenced the design, but did include problem solving consultation skills. The other seven offer expectations of conceptual understanding, skill and some experience in OD work. There seems to be a varied comprehensiveness in the outcome of technical mastery of diagnostic and problem solving skills. The university doctoral program includes research and teaching skills. These last two outcomes are definitely not part of the FETC systems and their prerequisites. Otherwise, there is a lot of similarity at a general level between the FETCs and the alternatives. At a specific level, there appear to be many differences. The specifics of some of the alternatives sound more similar to the FETC prerequisite systems, whereas other sound closer to FETC-I or FETC-II. Considering the amount of training time provided, none sound as comprehensive as the combination of the FETCs and their prerequisites with the possible exception of the university-based program.

Trainers

Three of the twelve alternative systems are conducted only by the one or two specific individuals who created them. This is similar to FETC-III training which presently only can be conducted by its two developers and one other NWREL staff person. The university doctoral program is conducted only by the faculty of that university. Five of the alternative systems are conducted only by staff of the organizations where they were created. One is conducted by staff of the organization where it was created, but the staff members indicate they can and will train local trainers when desired. Two of the systems are conducted by a national network of individuals who have been certified as capable. These last two rely heavily on films, written material and group discussion.

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Dissemination

The two alternative systems mentioned at the end of the preceding
section concerning trainers were the only systems created with the
same explicit intention of wide dissemination as were the FETCs. These
are each 3-day sessions and are correspondingly narrow in scope of
content compared to the 39 days of FETC training. There is probably
some overlap in content with the FETCs, although they sound more
complementary than competitive. The other systems have no dissemination
strategy. Most rely on mailing of brochures or word of mouth for their
marketing.

As many as 750 persons are claimed to have been trained by 2 of
the alternatives. One of these systems includes 10 days of training;
the other includes 3 days. Another system claims up to 200 trained,
another claims up to 150 and 2 more systems each claim 125. Another
system claims 45 and another 57. Four gave no indication of numbers
trained. During the past 3 years of development work, about 500 persons
have started through the combination of FETC systems and prerequisites
to the stage of completing FETC-I. Fifty-one have completed the full
sequence through FETC-III.

Six alternative systems gave no indication of evaluation. Four
indicate that participants fill out self-ratings at the end of training.
For one, participants write out critiques at the end of training. One
system claims evaluation has been conducted. Formative and summative
evaluation activities, utilizing a variety of evaluation techniques,
are part of the procedures by which the FETCs have been developed.

Conclusion

The alternatives search indicates there are definitely training
systems in use which are similar and/or complementary to the FETCs and

their prerequisites in at least some aspects of their content and strategies. Most of the similarities are found in the small group training aspects of PETC-I and in the theory of and techniques for organizational development covered in PETC-III. Only one indicates a differential system for diagnostic and intervention analysis such as is found in PETC-II. This system uses a three-dimensional matrix combining diagnosis with intervention. A fair amount of the content of the alternatives sounds more descriptive of the prerequisite systems than the PETCs. With the exception of the university-based program, most are much shorter. It should be noted that several of the systems covered some material not contained in the PETCs.

Use of the alternatives is controlled by their creatros, even in the case of the two created with a dissemination network strategy in mind. Very little formal evaluation is indicated as compared with the development work done on the PETCs and their prerequisites.

In summary, it appears that process training is increasing across the United States. It tends to be costly. Only the university program and the PETC combination seem comprehensive and integrated. Some systems present options not covered by the PETC combinations. There is also much which appears unique to the PETCs.

SUMMARY AND DISCUSSION

In this final chapter the methods of the evaluation are briefly reviewed, results of the evaluation are applied to the evaluation questions and conclusions are discussed. In addition two recommendations thought to be helpful to the developers of PETC-III are listed.

REVIEW OF METHODS

This evaluation submitted the pilot version of the PETC-III instructional system to three types of evaluation investigations. Four workshops were conducted and information was collected from 41 of the 50 trainees regarding their judgments of the quality and efficacy of the instructional system and their perceptions of its relevance, utility and overall value. The instructional system was given to four impartial, expert reviewers and they were asked to make judgments about the significance, completeness, feasibility and social fairness of the system's goals, content and training strategies. Finally, a search was conducted to identify existing alternatives to PETC-III and to compare PETC-III to these alternatives in terms of the following: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination procedures. The primary audience for all evaluation activities was the system developers who desired information to use as a basis for making subsequent revisions.

DISCUSSION

Ten major evaluation questions provided the focus for the overall inquiry. Originally presented in this report's Introduction, these

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questions are repeated for the reader's convenience in the section that follows. After each question is a summary of the information collected and analyzed in the evaluation.

Question 1: To what degree do persons trained in PETC-III during the pilot trials perceive the content, materials, activities and structure of the instructional system as being of high quality and effective?

On several questionnaire items intended to measure trainee perceptions of the content, materials, activities and structure of the instructional system, respondents reported moderately high or a high degree of positive regard. Using the two high points on a 5- or 6-point scale as an indicator of positive response, 83 percent reported that the workshop presentation was clear, 91 percent reported the content as appropriate for their experience, 61 percent claimed the materials demanded original thinking, 86 percent said the materials were interesting, and 56 percent reported the materials to be free from jargon. A similar positive response was observed concerning the activities and structure of the instructional system.

Question 2: To what degree do persons trained in PETC-III during the pilot trials perceive the training as being relevant and useful?

On several questionnaire items intended to measure trainee perceptions of the relevance and utility of the materials and the PETC-III training, approximately 80 percent of the respondents reported a high degree of perceived relevance. Respondents' perceptions of the usefulness of the ideas and learning were not quite as favorable. Sixty-eight percent reported that the training provided real "how to" help, and 78 percent said the learnings would be immediately usable.

Question 3: To what degree do persons trained in PETC-III during the pilot trials perceive the goals and objectives of the instructional system as clear and significant?

A high percentage of trainees in the pilot workshops reported that they saw the goals and objectives of PETC-III as clearly stated and of importance. Eighty-eight percent responded positively to the question on clarity and 95 percent said they believed that the goals and objectives were significant and important.

Question 4: To what degree do persons trained in PETC-III during the pilot trials perceive the training as being valuable in relation to costs incurred?

Of the 41 respondents in the pilot trials, 95 percent reported that the cost of acquiring PETC-III training was small or about right compared to what they had received from the training.

Question 5: To what degree do persons trained in PETC-III during the pilot trials perceive the pretraining materials as being adequate and sufficient?

On two questionnaire items intended to assess the affectiveness of the pretraining materials in terms of their adequacy and sufficiency, only 63 percent of the respondents reported them as being adequate or sufficient.

Question 6: To what degree do persons trained in PETC-III during the pilot trials report satisfaction with the training?

On four questionnaire items assessing trainee satisfaction with PETC-III and the overall training experience, over 80 percent of the respondents reported positively on all items.

Question 7: To what degree do persons trained in PETC-III during the pilot trials report a need for OD consulting abilities in the educational community and to what extent can PETC-III meet this need?

Of the 41 respondents 100 percent reported a definitely strong need for OD consulting abilities in the educational community. Over 90 percent of these same respondents saw PETC-III as having high potential for fulfilling this need.

Question 8: What type of people acquire PETC-III training during the pilot trials and to what type of organization do they extend consulting help during the practicum experience?

Descriptive data obtained from PETC-III trainees showed that a high proportion of trainees were experienced educators in staff or administrative positions in school districts. Over three quarters of the trainees worked with client systems of which they were also a member.

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Question 9:   From the perspective of impartial outside reviewers,
               are the goals, content and training strategies for
               PETC-III adequate in terms of their significance,
               completeness, feasibility, social fairness, etc.?

               In an outside, expert review of the PETC systems,
               reviewers for the most part commended the instructional
               system for clarity of goals and the soundness of its
               conceptual logic. They did raise several concerns
               regarding the social significance and fairness of the
               instructional system. These included: the implicit
               parameters of the target populations for which the
               system is designed, the neutral value stance in regard
               to important social issues, the sexist and racist
               implications of some parts of the materials and the
               possibility that the learning accrued to PETC trainees
               could be misused.

Question 10:   What are the existing alternatives to PETC-III and
               how does PETC-III compare to these alternatives in
               terms of: target population, content provided in the
               training, workshop procedures and strategies, expected
               outcomes, trainers and dissemination?

               Twelve other training programs were identified as
               alternatives or critical competitors to the PETC
               instructional system. Target populations, content
               provided in the training, workshop strategies, expected
               outcomes, trainers and dissemination procedures varies
               greatly across the various alternatives. This along
               with weaknesses in the search for alternatives made
               critical comparisons in terms of outcomes and costs
               impossible.

CONCLUSIONS

     In general, the information collected in the pilot evaluation of

PETC-III speaks favorably to the quality and efficacy of the instruc-

tional system. Participant trainees in four pilot workshops reported

very favorable reactions toward the instructional system and the

training they received. Four expert reviewers, for the most part,

concluded that the instructional system was clear in its goal and

consistent in its conceptual logic. A search for alternatives did not

produce any competitor exactly like PETC-III and when comparisons were

made between alternatives identified as close competitors, FETJ was shown to be considerably more comprehensive in its scope.

Two major weaknesses in the instructional system surfaced in the process of conducting the pilot evaluation. The evaluators recommend these be considered by the developers as they work toward revision and completion of final versions of the product. One, trainees reported that the pretraining materials and strategies were insufficient to accomplish the task of acquainting them with the instructional system and for assisting them in acquiring a client system for their practicum consulting experience. The developer should pay particular attention to this feature of the system and expand the number of materials and experiences provided to trainees prior to the first formal workshop meeting.

Two, the developer should heed the criticism expressed by the expert review panel regarding the sexist and racist implications of the instructional system and issues of social equity. This may mean that some portions of the instructional system should be rewritten to meet more stringent guidelines pertaining to sexist and racist language. It also may mean that more meaningful disclaimers about the purposes and strategies of the instructional system should be developed. Another strategy would be to develop ways that various groups could adopt the materials to meet their specific criteria for social fairness.

Subsequent to the collection of information for this report but prior to formal publication, the developers have taken several steps responsive to the two recommendations discussed above.

First, the developers have developed a new set of instructional strategies aimed at helping trainers become more familiar with FETJ-III

and adept at acquiring a client system for their practicum experience.
A monograph consisting of case studies of five past FETT teams and some
of the problems they experience also has been written and will be
included as study materials for prospective FETT-III trainees. The
effectiveness of the new strategies and materials remain unknown until
further use and testing occur.

Second, the FETT system has been submitted to extensive editing
and special attention has been paid to changing language that may be
sexist or racist in its implications.

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Appendix A:

STAGES OF EVALUATION AND PRODUCT
DEVELOPMENT OF THE IMPROVING
TEACHING COMPETENCIES PROGRAM

The management plan for the Improving Teaching Competencies Program divides the work flow for the development of an instructional system into five phases: Planning, Pilot, Interim, Field Test and Outcome. Each phase consists of certain development, evaluation and field relations activities that culminate in a milestone report.
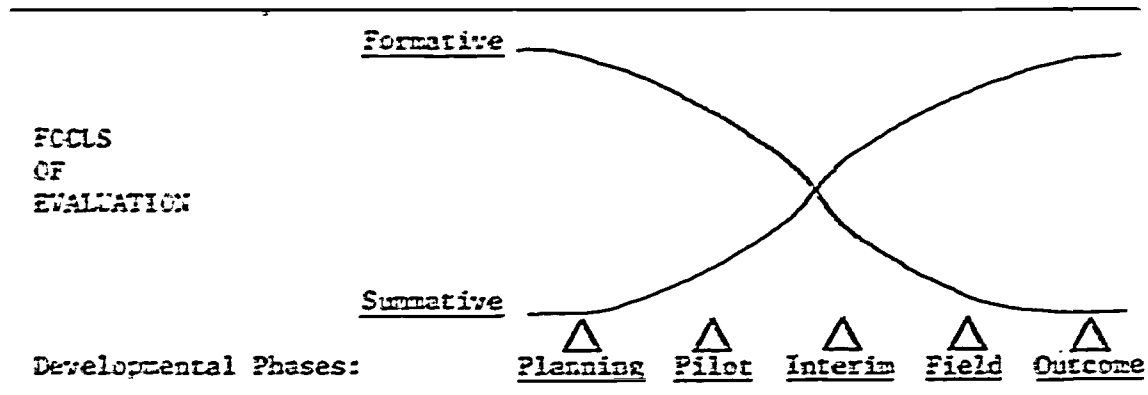
The range of activities associated with developing an instructional system are divided in five major categories: needs, objectives, product development, testing and implementation. These activities are partitioned among seven functional areas including management, development, field relations, dissemination, formative evaluation, internal summative evaluation and external summative evaluation. The matrix is not necessarily prescriptive nor are the evaluation relationships among each part strictly linear.

The specific activities engaged in during the development of an instructional system differ according to the phase under consideration, the unique needs of the specific product or change support process being developed and, occasionally, due to style preferences among work unit teams. For more specific and detailed statements, reference should be made to the development and evaluation plans and documents for each work unit.

Evaluation differs according to each phase of the development. During the initial phases, evaluation focuses on formative issues and provides information primarily for system developers. During the latter phases, the emphasis is on summative evaluation which provides information and judgments for potential users of the system. This shift in emphasis is illustrated in Figure A.

Figure

Evaluation Emphasis in the Developmental Phases

The following paragraphs describe in general terms the ways
development and evaluation activities are organized for each phase of
product development.

Planning Phase. In this phase, several key activities provide the
focus for effort. The initial conception of the proposed instructional
system is described along with its intended objectives. A need for the
proposed system is documented, and evidence provided that adequate
conceptualizations and instructional strategies exist or can be developed
feasibly for the proposed training package. Initial development,
evaluation and dissemination plans are produced, as are timelines,
staffing needs and budgets.

Pilot Phase. In this phase, a prototype of the instructional
system is developed and tried out on a small group of users from the
target group. Objectives of the system and entry conditions for
participants are clarified. Program evaluators provide formative
evaluation information to assist developers with revisions. The infor-
mation includes observer and trainer assessments of participant involve-
ment in the activities, measurements of participant satisfaction with

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the content, strategies and utility of the system. The workability
of the activities, the logic of the content and the quality of the
teaching aids and materials are also assessed at this phase by the
user groups. Description and preliminary assessment of trainee
outcomes are initiated.

The collection of information regarding the marketability and
costs of the instructional system commences during the pilot phase as
does the documentation of the developers' claims regarding the intents
of the system in comparison to existing alternatives.

Interim Phase. During this phase, the instructional system goes
through one or more cycles of revision and a nearly finished product is
completed. By the end of this phase, the appropriateness of objectives
has been determined, statements of objectives finalized and instrumen-
tation to measure these selected or developed. For instructional
systems requiring a workshop format, specifications are determined for
desirable workshop conditions and qualifications for effective trainers.

The major focus of the evaluation activities for this phase is on
confirmation of the system's ability to produce specified short-term
outcomes and to test the workshop conditions, trainer qualifications
and dissemination feasibility. This may be accomplished partially
through conducting a "criterion workshop" designed to resemble closely
the field conditions. The basic decision served by evaluation is
whether the instructional system is ready for internal summative
evaluation and adequate for comprehensive field and outcome testing.

Field Test Phase. In this phase, minor revisions are made on the
instructional system and a product close to finished form is expected
to exist. Also, in this phase, an internal summative evaluation will

focus on assessment of short-term outcomes of the instructional system. Specifically, this means finding answers to questions regarding knowledge, awareness and attitudinal growth and participant performance change that can be expected as a result of active participation in the system's training design under field conditions with typical trainees, trainers and workshop settings. Variables related to problems of installation and dissemination may also be examined at this point.

Outcome Phase. During this phase, which may occur simultaneously with the previous phase, the instructional system is finished and internal summative evaluation will assess the system's ability to produce, not only specified short-term outcomes in terms of participant satisfaction, knowledge, awareness or attitudinal gain and performance change, but also transfer, retention and impact upon secondary audiences such as students and/or peers. At this point evaluation plans are made for external summative evaluation studies such as critical comparisons between the outcomes of the instructional system being evaluated and outcomes produced by other relevant treatment efforts. External summative validations of the product are also completed in this stage.

Appendix B:

PETC-III BACKGROUND QUESTIONNAIRES

Version A
Version B

Name_____

System PETC-III_____

Trainer_____

Site_____

Date_____ Sex____ Age____

BACKGROUND QUESTIONNAIRE

1. HOME MAILING ADDRESS: Street_____ Phone_____
   City_____ State_____ Zip____
   (This is necessary for NWREL to acquire
   followup information)

2. WORK ADDRESS: Street_____ Phone_____
   City_____ State_____ Zip____

3. ROLE: Give your position and then check appropriate space below:

   Position:_____

   ___Preservice trainee   ___Teacher aide   ___Other (write in)___
   ___Inservice teacher   ___Supervisor or   _____
   ___Administrator   Coordinator   ___Multiple roles
                            ___Teacher   (please list)_____
                               educator   _____

4. YEARS EXPERIENCE IN EDUCATION: Check appropriate space below:

   ___0   ___4-6   ___10 plus
   ___1-3   ___7-10

5: HIGHEST DEGREE OBTAINED:
   ___BA   ___MA   ___Doctorate

6. INVOLVEMENT IN OTHER NWREL INSTRUCTIONAL SYSTEMS: (Check + if
   participant; 0 if trainer)

   ___Interaction Analysis   ___Interpersonal Communications
   ___Facilitating Inquiry   ___Interpersonal Influence
   ___Higher Level Thinking   ___Group Process Skills
   ___RUPS   ___PETC-I
   ___SAFE   ___PETC-II
   ___Conflict-Negotiations

7. BRIEFLY DESCRIBE YOUR PRIMARY CLIENT SYSTEM (Name, etc.):

   _____
   _____
   _____
   _____
   _____

8. WHAT IS YOUR ROLE RELATIONSHIP TO THE CLIENT SYSTEM:

    ___External
    ___Internal
       If internal, please explain role relationship_____
       _____
       _____
       _____

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79

BACKGROUND QUESTIONNAIRE

1. Name _____

2. Home Address: Street_____ Phone_____
   City_____ State_____ Zip_____

3. Work Address: Street_____ Phone_____
   City_____ State_____ Zip_____

4. Age: _____
   1-2

5. Sex: (1) ____ F   (2) ____ M
   3

6. Position: (1) ____ Teacher   (1) ____ Primary, 1-3
   4-5   (2) ____ Administrator   (2) ____ Elementary, 4-6
            (3) ____ Staff   (3) ____ Jr. High, 7-9
            (4) ____ Other (specify) (4) ____ Sr. High, 10-12

7. Highest Degree Obtained: (1) ____ BS/BA
   6   (2) ____ MS/MA
                            (3) ____ Ed.D./Ph.D.

8. Years Experience: ____ Teaching   ____ Administration
                          7-8   9-10
                     ____ Staff work   ____ Consulting
                          11-12   13-14

9. NWREL Instructional Systems Previously Attended:
   (Indicate with a (1) "S", and a (2) "T", those systems where you
   were a Student or Trainee, respectively.)

   15 ____ Interaction Analysis   21 ____ Interpersonal
   16 ____ Facilitating Inquiry   Communications (IPC)
   17 ____ Higher Level Thinking   22 ____ Research Utilizing
   18 ____ System Approach for   Problem Solving (RUPS)
           Education (SAFE)   23 ____ Group Process Skills
   19 ____ Conflict-Negotiations   24 ____ PETC-I
   20 ____ Interpersonal Influence   25 ____ PETC-II
           (IPI)   26 ____ PETC-III

10. Additional Training:

    In addition to the systems listed in Question 9, please indicate
    below all other training experiences you have participated in
    related to organizational development, consulting, or problem
    solving. Please specify whether you participated as a student
    or trainer, when the training took place, and what the general
    nature of the training was. (Include courses, workshops,
    practice, on-the-job training, etc.)

11. Consulting Experience:

Indicate below your consulting experiences over the past five years. Do not include consulting which was only done as part of GPS, PETC-I or PETC-II training.

27-29 ____ Approximate number of clients a year

30-32 ____ Average number of days a year spent consulting

General type of client system (or list range of clients worked with):

General nature of usual consulting problem or task (or list range of consulting tasks worked on):

12. Date: ____ / ____ / 1975
33-34 35-36 37-38

13. Workshop: (1) ____ Seattle A
39 (2) ____ Seattle B

27-29

30-32

33 34 35 36

37 38

39

X = column number, X = value

Appendix C

DOCUMENTS RELATING TO FINAL
QUESTIONNAIRE

PETC-III Final Questionnaire
Letter to PETC-III Graduates
Open-Ended Responses from
    Final Questionnaire

FINAL QUESTIONNAIRE

Please do not write in this margin

Name: _____

Workshop: Seattle A   Seattle B
      5   (1)   (2)

|_|_|_|_|
 1 2 3 4

Date: _____
6-11

A. To what extent has this workshop fulfilled your expectations about
    what you personally might get out of it?

|_|
 5

    1. Has not come   Has exceeded my
    12 up to my   expectations
        expectations   /__/__/__/__/__/__/ |_|_|_|_|
                        1   2   3   4   5   6   6 7 8 9

|_|_|
10 11

|_|
12

B. Think for a moment about the informational materials, practice
    exercises and methods used in this workshop. All in all, how
    would you rate them? (CHECK ONE BOX IN EACH LINE)

    3. Only restated   Offered new
    13 or provided   insights, new
        what I already   ways of viewing |_|
        knew   /__/__/__/__/__/__/   old problems   13
                        1   2   3   4   5   6

    4. Spoke to   Missed the
    14 important   important
        issues, vital   issues, vital |_|
        concerns   /__/__/__/__/__/__/   concerns   14
                        6   5   4   3   2   1

    5. Hard to   Clear, concise,
    15 understand,   understandable
        complex, full |_|
        of "jargon"   /__/__/__/__/__/__/   15
                        1   2   3   4   5   6

    6. Ideas, skills,   Usage would
    16 methods can be   require changes
        used immediately   in conditions
        under existing /__/__/__/__/__/__/   that I have no |_|
        conditions   6   5   4   3   2   1   control over   16

    7. Little "how to"   Provided real
    17 help for my   "how to" help
        actual group   for my actual |_|
        work   /__/__/__/__/__/__/   group work   17
                        1   2   3   4   5   6

    8. Material   Material failed
    18 maintained my   to interest me |_|
        interest   /__/__/__/__/__/__/   18
                        6   5   4   3   2   1

    9. Demanded much   Demanded no
    19 original   original |_|
        thinking   /__/__/__/__/__/__/   thinking   19
                        6   5   4   3   2   1

83

10. Practice
__ exercises were
of little or
no value

/__/__/__/__/__/__/
2   2   3   4   5   6

Practice
exercises were
of great value

|__|
20

11. Session time
21 was well used

/__/__/__/__/__/__/
6   5   4   3   2   1

Time in the
sessions was
wasted

|__|
21

12. Structure use-
22 ful, promoted
learning

/__/__/__/__/__/__/
6   5   4   3   2   1

Too structured,
blocked learning

|__|
22

13. Gained new
23 insights about
my style of
consulting

/__/__/__/__/__/__/
6   5   4   3   2   1

Learned nothing
new about my
style of
consulting

|__|
23

14. Allowed time
24 for reflection
about self and
personal growth

/__/__/__/__/__/__/
6   5   4   3   2   1

Did not allow
time for reflec-
tion about self
and personal
growth

|__|
24

C. Considering this workshop as a training program for colleges and school
districts--(CHECK ONE SPACE FOR EACH QUESTION)

15. How would you rate it in terms of its potential for organizational
25 improvement?

Low potential   /__/__/__/__/__/__/ High potential
1   2   3   4   5   6

|__|
25

16. How would you rate this workshop compared to other professional
26 education courses you have taken?

Very Low   /__/__/__/__/__/__/ Very High
1   2   3   4   5   6

|__|
26

D. Consulting with a Client

17. In an overall assessment of your consulting experience, was it:
27

Extremely
valuable,
worthwhile
experience.
Much learning
accomplished.

/__/__/__/__/__/__/
6   5   4   3   2   1

Little value,
no learning
accomplished

|__|
27

What are the major factors contributing to your assessment?

18. What were the specific learnings for you as a result of your
consulting experience?

19. Problems arise in almost every consulting experience. What sort of problems, if any, did you encounter?

E. In all honesty, how much do you plan to use the ideas, skills and/or materials presented in this workshop as an integral part of your work?

20. Extensively ___/___/___/___/___/___/ Not at all
28   __6__ __5__ __4__ __3__ __2__ __1__

|__|__|
28

21. How do you think this workshop experience will be of value to you in the future?

F. Now that the workshop/course is over, how would you sum up the experience?

22. Now very ___/___/___/___/___/___/ Extremely
29 worthwhile __1__ __2__ __3__ __4__ __5__ __6__ worthwhile

|__|__|
29

23. What are the major factors contributing to your assessment?

24. Which of the following costs did you incur out of your own pocket in order to attend this workshop? Please estimate the amount.

$_____ Travel costs   30-32
$_____ Room and board   33-35
$_____ Tuition or fees   36-38
$_____ Other expenses (please specify) 39-41

_____
_____
_____
_____

|__|__|__|
30 31 32
|__|__|__|
33 34 35
|__|__|__|
36 37 38
|__|__|__|
39 40 41

25. Did you give up potential income in order to attend (e.g., other jobs)?

(1) ____ No 42
(2) ____ Yes. If yes, please give an estimate of how much $_____
43-45

|__|__|
42
|__|__|__|
43 44 45

26. Considering the costs (e.g., monetary, time, etc.) that you
46 incurred in order to attend this workshop, how do you feel?

(1) ____ The costs were too great compared to what I got out of it.
(2) ____ The costs were about right for what I got out of it.
(3) ____ The costs were small compared to what I got out of it.

|__|__|
46

Additional comments:

85

C. Please circle the response that best reflects your opinion of the following characteristics of the workshop.

27. Please rate the goals and objectives for:

a. Clarity
47

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
47

b. Significance/Importance
48

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
48

28. Please rate the workshop content: Skills, concepts, principles and values for:

a. Appropriateness for your experience and understanding
49

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
49

b. Relevance for learning to be a consultant
50

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
50

c. Clarity of presentation and definition
51

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
51

d. Parsimony (little or no unimportant or not useful material)
52

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
52

e. Practical significance for successful consulting
53

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
53

29. Please rate the workshop methods/strategies/procedures for:

a. Appropriateness for learning to be a consultant
54

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
54

b. Practical usefulness in learning consulting skills
55

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
55

c. Efficient use of time
56

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

|__|
56

30. Please rate the preworkshop orientation materials and activities for:

   a. How successfully they provided you with information you
  57 needed

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

⌞⌟
57

   b. How successfully they gave you clear and correct expectations
  58 about the nature of the workshop

			Needs	
Excellent	Good	Satisfactory	Improvement	Unsatisfactory
1	2	3	4	5

⌞⌟
58

31. Will you have the opportunity to actually do the kind of
59 consulting taught in EDTC-III?

⌞⌟
59

  (1) ____ Yes (Do you expect to do so?)_____
  (2) ____ No (Why?)_____
  (3) ____ Uncertain (Please explain)_____

_____
_____

32. Do you think time commitments and prerequisites for EDTC-III
60 are excessive?

⌞⌟
60

  (1) ____ Yes, definitely; could be reduced somewhat
  (2) ____ No, they are demanding but necessary
  (3) ____ No strong opinion either way

33. Did you need the approval or release of a supervisor in your
    organization to attend this workshop?

    If so, would you mind if we were to contact that person about
    his/her perceptions of EDTC-III?

    If no, please provide a name, position and, if possible, a phone
    number or other means of contacting this person.

34. Do you believe there is a need in the educational community for
61 educators with organizational development consulting abilities?

⌞⌟
61

  Please check one:
    (5) ____ Definitely strong need
    (4) ____ Probably some need
    (3) ____ Probably not much need
    (2) ____ Definitely no need
    (1) ____ No opinion

35. Please rate the potential of EDTC-III for meeting such a need:
62

⌞⌟
62

  Circle one: Excellent Good Fair Poor None
                5   4   3   2   1

⌞⌟
80

83

Northwest
Regional
Educational
Laboratory ◣◢ ___ ___ ___ ___ ___ ___

July 21, 1975

During the past year, you were involved in *PETC-III: Organizational Development* training. The *PETC-III* system, developed by the Northwest Regional Educational Laboratory, is going through the final stages of evaluation. In order to complete this project, we need your help in collecting some final information. We would appreciate your cooperation in supplying us with this information.

Enclosed is a questionnaire which asks you to rate various aspects of the workshop, its strategies, content, process and applicability. It also asks for information on the costs you incurred while participating in the workshop. The questionnaire requires approximately 20-30 minutes to complete. We ask that you fill out the form as completely and honestly as you can. All responses will of course, remain confidential. We have enclosed a prepaid envelope addressed to the Lab to aid you in returning the questionnaire to us.

If you have any questions, please feel free to call (COLLECT) David Green at (503)248-6872 or Dick Arends at (503)248-6862.

Thank you for your cooperation.

                    Sincerely,

                    Richard Arends, Senior Associate
                    Improving Teaching Competencies Program

                    David Green, Staff Specialist

RA/DG:s
Enclosures

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Question 17

In an overall assessment of your consulting experience, was it:

(6-point anchored rating scale)

6 = Extremely valuable, worthwhile experience. Much learning accomplished
1 = Little value, no learning accomplished

What are the major factors contributing to your assessment?

Rating   Response

6   Learning group sharing and assistance.

5   In addition to my personal learnings, the consulting experience during PETO-III resulted in a new program for my client. The program includes 8 paraprofessionals in a training program/working program with a $12,000 budget.

5   Made numerous changes as result of sessions.

3   Little actual contact with client.

6   There is no way like doing it to learn how—learned tremendous amount about myself and consulting and OD and organizations.

6   I believe that the practicum experience was absolutely essential for the learnings to have occurred which did for me.

6   I've used much of what I learned in a consultant role. The entry process was of significant value.

5   Opportunities to share experiences with client, with learning group and trainers and receive feedback. Simply the opportunity to practice consulting skills.

6   Learning how to make entry in my own organization during a crisis period. Having five people in the organization who had considerable amount of experience in OD.

6   Learned by doing. Mistakes I made were extremely valuable for personal growth.

6   The consulting experience provided a means to test out strategies, planning, skills, etc., without this experience the PETO-III program would have been of little value.

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Rating   Response

3   This was due to an overload of personal commitments as much as
     the FETO-III workshop. My personal limitations to fully
     pursuing my consultant/client relationship and thereby neither
     really satisfying my client or myself as a consultant. Diffi-
     culty in assimulating the bulk of FETC-III data as immediately
     useful. Limited professional opportunity.

4   The client really wasn't ready for what we wanted to do.

6   In the words of one of my friends, "Reality is often a jab in
     the eye with a blunt stick." My experiences punctured most of
     my myths about consulting, clearing the way for a more mature
     approach to it. What I learned during my experiences provided
     me workable materials for building that approach.

6   Each of the parties to the contract followed through. Client
     group situation was complex and challenging--we were able to
     intervene in a number of different ways. Working with Tom was
     important to me.

6   The organization of information needed by an OD consultant.
     The critique and intergroup experiences. The focus on a real
     client system. The help of the trainers.

3   Difficulty in securing client system, then client system turned
     out to be a group rather than an organization. Minimal trust
     between client system and one member of our team. Client system
     primarily political group rather than educational. We did not
     do our best for them and we didn't help them much.

6   My rating is based on what I observed happening in the
     District...and is continuing to happen. Also, the greater
     awareness of my influence, strength and weaknesses--when I can
     be helpful and when not!

6   Content new to me. I found it very worthwhile. Allowed time
     in sessions to digest content and apply it to one's own
     situation or consultation style.

5   The experience I gained. The positive changes manifested by
     the client system.

6   For the college; our team gave them valuable information. I
     think much of next year's administrative-faculty action will
     be based on findings we presented. We gave guidance in
     reorganization. Our college has a long way to go, but the
     Administration is moving and has plans for next year.

Rating   Response

5   Team member. Client system, (people involved). A lot more
     could have been accomplished under different circumstances.
     However, just that knowledge gained made the experience
     worthwhile.

6   My team member helped me with new perspectives. My client
     (organization) was already quite effective and efficient:
     Ruth and René are highly motivated and task oriented. The
     structure of PETP-III was not so restrictive.

5   Competence gained, know I can be a successful OD consultant.

6   Opportunity to translate theory into OD work. Plentiful
     feedback. Very supportive climate.

6   I was able to relate organizational actions to a cognitive
     system—understand and predict what was happening (the reaction
     of Seattle schools) when crisis of any failure occurred.

5   Provided procedures (matrices) for diagnosing and intervention.

5   Doing is most important. You really find out how you operate
     and how client responds in real situation. Far better than
     simulation.

6   Allowed me to use my learning style (with do-look-learn) and
     to clarify those learnings.

5   The project allowed us to formally begin a 3-year project in
     our district. It is now legitimized and underway--entry has
     been gained! Some structural change has already occurred.

5   Experienced directly much of what dealt with in training
     sessions.

6   Opportunity to do work with client and then have workshop as
     procedure for several months. Team work, learning group--PETC
     trainer with group entire time was a real plus!

4   Did not get into work with consultees enough. Not enough
     commitment from client.

5   Consultation with client became bogged down. Valuable learning
     came through discussion in learning group about pitfalls in
     consulting with client. Know what to do and what not to do in
     a similar situation.

5   Support from LG, client withdrawing during the course of
     training, CIB and training design.

Rating   Response

6   Opportunity to share experiences with others. Confidence in trainers and resources, references, etc.

4   Limited time. Artifical. Had to seek out client, which didn't allow time to complete consultation process as would have liked.

6   Over 100 hours of work with the client system afforded many challenges, experiences, opportunities. We had a good support base with our T.U. and learning group and trainers.

6   This is a new experience and my only consulting experience has been in relation to FETC.

4   Application of skills, theory, etc. in practice situation (i.e., experiential) provided direct and useful feedback not possible in Lab or lecture setup!

5   Saw inside of large organization. Observed from initiation of new representative groups. Observed administrative reaction during crises as well as observing on building level.

Question 18

What are the specific learnings for you as a result of your consulting experience?

Increase in my analytical skills.

The perspective of looking at a total organization through its functions and operational characteristics. Also, a lot more understanding about the consultant's role, especially a more facilitative outlook.

Learned to consider own biases much more seriously. Care in planning intervention strategies and considering their consequences. Evaluations of functions and how to identify with some precision growth in those functions.

That I already knew more than I knew I knew. Put into cognitive frame what I had been doing "off the cuff."

That one needs a power base for influencing organization to change-- eitner ligit or export or referent or something. That I OD is not an area of great expertise for me. That organizations need to see themselves as needing help and change to consult with them. Ways of diagnosing organization, ways to intervene much more.

An OD consultant can only facilitate change--the members of the organization make the changes. Line managers must have OD skills and knowledge if significant changes are going to occur within the organization.

Concepts of organizational health and strength. Diagnosis, data collection, intervention strategies. Entry strategies.

Importance of entry and how to design more appropriate entry strategies. Data collection--importance of and specific tools, techniques. Identified hazards of which to be aware.

Learning how to diagnose and gain entry in my own organization, realizing the problems inherent in an internal consultant's role and learning how to apply learnings to different settings.

Entry procedures. Goal setting. Necessity of knowing the client and planning every step. Many others.

I learned the definite necessity of thorough planning for interventions, when dealing with a complex system especially. The value of a thorough debriefing and record keeping. My need to work in a team situation or to use other consultants' reactions--reality testers, etc.

That I am not personally capable to serve as a consultant at present, and that I have to become more professionally oriented in my approach to consultation.

client preparation very important.

First, success in consulting demands a definable rationale for every decision. I must know what I'm going to do, why I'm going to do it, what I expect to achieve, and how I think that's all going to happen. Only then can I assess and evaluate what actually does happen. Second, I have a lot to do. My sharper impression in this respect is that consulting requires consistent effort over a long period of time to achieve results.

That organizational structures and norms are really binding but that it helps to have in mind a concept of maturity and growth to gain perspective (knowledge). That I, as consultant, need to confront more actively, I tend to be more indirect in my interventions (skill, value issue). Tolerance for ambiguity is an important trait for a consultant.

Developed assessment skills and tools. Developed a sense of the "wholeness" of an organization system. Developed specific strategies for change. Developed an understanding of the cultural background in education.

Diagnostic tools and value of same. Understanding of OD involving structural and normative changes, rather than just substantive. Need for effective entry/exit strategies. Constant monitoring of consultants needs and motives. When not to use OD. How to explain OD to a non-acclimatized person or group. Universal Traveler. New roles and new value for team work, etc.

Most significant--probably the value of careful PLANNING. Found
the intervention theory format very helpful...also having the time
available, a very competent team member and perceptions of L.G. in
regard to our plan.

How carefully a training program needs to be installed within a
system. The importance of a clear initial consulting agreement.
The importance of being directly involved oneself in initial
agreements about consultation or training program installation.
Consideration of one's consulting style(s) in relation to the level
of maturity and stage of growth of an organization.

That persistence is a good trait for a consultant to have. That
a client may balk at following through in promises made.

I have a new picture of what I should be doing as a consultant.
I have a developmental philosophy of organization development
which I did not have before. I am finding the matrixes good for
organizational application and also for me as a consultant. My
skills have improved immensely.

Strengths and weaknesses in skills means of approach as a woman.
Timing of contacts in client or potential client system. Impor-
tance of Dx and adhering to readiness levels of client system.

That OD is a complex and lengthy task. That the client must be
committed. That contracting is a very important part of consulting.
That change is slow.

Diagnosis sharpened. Interpersonal skills sharpened. Knowing I
am influential and have impact.

This is a beginning, I need to commit myself to ongoing professional
and personal development. I need to work in a team. Learning can
be very exciting. I want to become a full time ODC.

How an organization at opinionated maturity phase immediately
regressed to stereotypic phase when disrupted by any failure;
I was able to negotiate conflict and exert effective influence
in ongoing work situation.

Problem definition. Action techniques. Acquisition of skills.

I am no longer reluctant to do ODC work because of the experience.
Gained confidence. I see how very important the extensive pre-
planning is--and that you get results if you take the time to
diagnose and plan. It isn't easy but it is rewarding.

Clarify ODC/top management--I learned they may be one in the same.
Proactive learning is real. Skills increase (group--design, etc.).
Conceptual power increase (OD--schools linkage).

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I don't want to be a skills trainer with my own client again.
ODC's must work in teams with at least 2 members. OD technology
is still very young and undeveloped. OD work and training is a
part of management training.

Behaviors are quite predictable under given circumstances.

Ways of dealing with problems that were brought to learning group,
e.g., techniques of confrontation, what I might have done.
Evaluation of design, interventions.

Different approaches. Lots of what not to do.

Ability to express self in small group. Appreciation of teamwork
approach. Need to be more confrontive. Need to take initiative--
not always maintain counselor role. Allocate more time to team
maintenance.

That I need to grow in understanding and skill to deal effectively
and affectively with organizations in crisis.

Gain in confidence. New techniques and strategies of intervention.
Improved skills in diagnosing, analyzing.

Experienced process of consulting. Learned by experiencing steps
in entry, diagnosing, etc. mini scale.

Self-confidence. Importance of clear contract in entry. Cognitive
learnings about leadership. Group process experience. How to help
a group set up their own agenda. What team work is all about.

I have more skills than I realized. How to make better use of
available resources. Adjust my maturity to level of group.

Entry problems and experience--need for specific explicit expecta-
tions--written in contract. Personal, behavioral feedback--team
maintenance. Experience and growth in goal definitions, problem
solving, analysis. Need for involvement and/or support from power
administration in organization.

Reaction of system in crisis at various levels. Reaction of newly
formed representative group. Positions taken in that group by in
and out groups (how that changed with crisis). How risk taking
varied with the nature of the group the representative came from,
etc.

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Question 19

Problems arise in almost every consulting experience. What sort of problems, if any, did you encounter?

The time sequence in working with my client, i.e. the end and beginning of school year in the middle of the project.

Entry problems that reoccurred every time, I thought they were solved. The role confusion of my clients developing the fact that I am an internal consultant.

Data became out-of-date so quickly. Continually wanted to do what I could do well rather than what client needed.

My partner became the consultant and I became a consultant to him. We were working with volunteer organization so didn't have clear visibility of client at times.

Had difficulty making entry.

Entry. Support as internal consultant. Members expected "expert" skills from practicum team.

Lack of accurate data. Could not establish a firm relationship with client. Client took one full year to decide to improve.

Insufficient data before making intervention. Time constraints. Commitment on the part of client (some members).

Gaining entry--coping with problems of which I was in part responsible.

Basic problem was that the client said one thing about wanting change, but all behavior pointed in opposite direction.

The clients lack of commitment to the project (consultation) as witnessed by their not taking time to prepare for meetings--reading our reports, etc. Deciding ways to confront the client constructively.

As a consultant team we met with difficulty in maintaining a solid working relationship with our client. We were also beset with internal personal conflicts as consultants which were deleterious to optimum effectiveness.

Partner too far away--didn't negotiate contract with client very well.

Logistics: My partner and I were separated by 100 miles, and the client was closer to him. His exposure to the client influenced his approach to the situation before I was introduced to the experience. We had to deal with a client which was always in the exit position with regard to the consulting relationship.

Our team member dropped out. Getting hooked into the section leader's preferred strategies too much.

I was a consultant to my organization which consisted of myself and one other person. Problems arose around who was the client and who was the consultant.

Apparent difficulty in getting support for our PETC-III work from our workshop trainers and some other participants. Difficulty in getting critique assistance for our effort from two members who had value problems with our client system. Feeling on part of trainer that we were not ready for PETC-III. Made it difficult to approach client with confidence.

Teammate and I having time to do adequate planning. As we became aware of value, we set dates before leaving Seattle.

Lack of acceptance of some crucial administrators about the PETC-III practicum experience. Great difficulty in defining a client group.

The issue of getting the client to own responsibility for some of its shortcomings. Gaining acceptance as someone with some skills to offer.

I was not as visible as I would have liked to been. Our team did not move as rapidly with workshops, seminars, and meetings as I would have liked. The president did not want this and I had a feeling the faculty would have objected. We worked the matrixes and tried to determine things but a lot of the time we were unclear about strategy and failed to think in terms of many years.

Readiness level of client. Reorganization—beyond our control. Splintered group. Illness and distance.

Lack of time to devote to the client.

Low awareness of client system. "Part-time" nature of OD consultation.

Didn't pay enough attention to teamwork. Need to continually clarify expectations. Not well enough informed on the literature.

Missed opportunity to influence by not noting or stating norm breaking of group which pretty much killed "collaborative planning" goal/process of client group.

How to sort out all the data and where to begin.

My reluctance at first was a problem. The difficulty of the client wanting to know exact outcome and the problem of looking at us only as facilitators rather than experts with answers.

Question 19 (Continued)

Problems related to: (a) historical blockages in system, (b) lack of experience in skills/knowledge of PETC and (c) my allocation of energy in setting.

Inability to get good and comprehensive organizational assessment data. Time to work on the project in the real setting. Dealing with late adopters is tough.

Timing, i.e., we didn't always do the right thing at the best time.

Resistance from client. Lack support from administration in any real sense. Energy, March through June time span gives too little time for any major changes.

Noncommitment of client. Keeping a client. Demonstrating enough skills at beginning.

Client who was passive-aggressive. Client terminated due to levy failure and lack of energy and motivation. Frustration with inability to expand client system.

Client apathy and ultimate termination.

Limited time frame to thoroughly plan, review references, etc.

In establishing working relationship with a client where needs were identified or help was sought.

Didn't have a clear agreement with one group what we and they (a) wanted, (b) method of intervention. I perceived uneasiness within me and group in dealing with results of the questionnaire.

Identity of client. Nature of client's goals.

Problems arising from crisis resulting in levy failure, i.e., confusion, apathy, anxiety—less than usual commitment to change originally identified.

The issue of power and how it was to be used. Sharing of resources. Planning break down during crisis.

Question 21

How do you think this workshop experience will be of value to you in the future?

It has sharpened my skills in many areas.

I am continuing to work as an internal consultant and will use the information and learnings extensively. I attended an OD lab for a week this summer and felt that my experiences there were much richer as a result of PETC-III.

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I continually find I use both styles of planning and language learned in the workshop. Assume this will continue. I happen to work with several others who have taken PETC and we plan together in the styles developed at workshop.

I have _been_ using the concepts in doing consulting so know it will be of continuing value.

In working with organizations as a member to increase their health from inside. Understanding organizations and efforts to make changes in them, their problems, how they operate, what can go wrong, etc.

PETC-III put the umbrella over all my previous training experiences. It was the "peak experience" of my professional career upon which I constantly refer back to and grow from. I feel now that I will use to my fullest all of my experience.

I've been using the skills and information consistently since the workshop as an OD and staff development consultant. Most of the work has been in staff development where many of these same skills were most helpful.

In my day to day work I constantly use the consulting skills learned and plan to continue and make even more extensive use of skills.

I plan to concentrate on OD as an area of focus in the next few years. I plan to form ODC teams with 3 or 4 other OD consultants to carry out OD work in educational organization.

I will use the ideas, methods, etc. to further my own personal growth, and to help others gain insight and learn new skills.

It has already helped me in gaining entry into significant client system as an organizational consultant. There is potential to build from this client system to others. The knowledges, skills, strategies, etc., are invaluable to my present and future work.

This question seems to be dependent upon what my future will be. At this point, the usefulness of the workshop experience is nil due to rampant unemployment (mine).

Mostly, the knowledge base will be of value.

It appears that I will move into a management role in my job. I will use my experiences and knowledge in executing that role. I also intend to consult professionally. In this regard, my experience has been an invaluable aid.

Current, and for the next 2 years, I'm directing a Title III project and will be using an OD framework on the job. My plans are to continue in consulting work—either inside or external—and do some research on OD work.

I have used the ideas, tools, manuals, etc. in several consulting experiences since.

I will be serving as an external consultant and staff trainer for many organizations in the educational, service, and cultural areas. I may also become a staff CD specialist for a major medical center here.

Believe much of the learnings and experiences have become a part of me and as such are used daily in my administrative activities at Douglas.

Gives me a different (additional) frame of reference for looking at organizations and their development which will be useful in future contacts with organizations.

Gives me some additional viewpoints on how to do consulting work with a client system.

I am applying to the army to join their OD group. I am changing my approach as consultant. I am working to get some small schools into OD. I would like to provide them services as an OD consultant. I met the superintendent and pricipal from.... We are working something out. I am working on a state grant (really federal monies) to begin next year with a large South Dakota school district in OD.

Knowledge, insight gained--be more prepared to confront and deal with complexities of organizational consulting, also more confident.

It will help with the diagnosis aspect of consulting.

To train the system. To provide for own continuous development. Opens up new possibilities.

This will be extremely valuable to me--I intend to spend much more time studying the materials and to form a permanent learning group with other PETC-III participants for growth and support.

In being a more effective group member--group leader--and in under-standing/predicting behavior of groups. Opportunities as a change agent are now limited professionally since I've been RIFed and am returning to school.

My experience was mainly as an inside consultant. I found that experience to my liking and I find it comfortable to continue in that manner.

Feel able to deal with problems in a constructive manner and work with different types of people in groups or organizations to make operation more positive for all.

I have a better understanding or appreciation for the time it takes to affect change and a higher respect for various differences in personal needs relating to the process of change.

As a superintendent--installing PODS, PETC. As a consultant/ trainer for money. As a continuous learner.

Yes, as I reflect back upon it and continue to review, integrate and apply the theory and procedures in the real organization.

Whatever other skills a person may have will require the support of organizational skills for best level of functioning.

In job, as facilitator, change agent, consultant.

I think the experience has increased my total skill bank and confidence thereof that it is an extreme value that with some more integration it will significantly influence my future.

Training will enable me to conduct workshop within my work situation. May be useful as part of skill pool of student service workers. May use to build own business.

It serves as a basis of a decision to move toward greater involvement in long-term consulting activities.

I have developed a long term OD consultant role with high school "B" complex staff and plan to expand to include "A" complex staff to reach over 100 staff members within the next 2 years. My OD interventions, it is hoped, will be seen as a success model that can and will be developed in other schools, the regional administrations and the central office staff.

If remain a counselor will use daily in work with principal and staff. May conduct independent training sessions for interested groups.

Personal growth. As a classroom teacher. In group process and in helping a group get a task done. Maybe as an OD consultant.

It depends on my work assignment. As a classroom teacher I can use many of the skills, but will not have a great deal of opportunities for consultative experiences.

In consultant type activities with future organizations or groups for when I will work. Broader understanding (cognitive) or organizations and complexity of change.

In any organization, I think I could be of help in relation to various OD related issues. I could be involved in a formal or informal way depending on the nature of my position and the nature of the organization.

Question 22

Now that the workshop/course is over, how would you sum up the experience?

(6-point anchored rating scale)

6 = Extremely worthwhile
1 = Not very worthwhile

Question 23

What are the major factors contributing to your assessment?

Question 22 Rating	Question 23 Response
6	I have a better background for further work as a consultant and more resources from which to draw.
6	The do-look-learn method maximizes results. Working with Emory/Pino is an invaluable experience in itself. The results were valuable for my client and for me.
6	Developed usable skills at workshops.
6	Never had OD put together with so much understanding before. Have a common experience with my coworkers in TENT—which I consider extremely valuable personally, professionally.
6	The personal learning-self learning. The experience in trying to help.
6	The degree to which I draw from my experience in workshop.
6	Mostly in terms of the help I received in improving staff development skills. Entry - data gathering - diagnosis - workshop design.
6	This is by far the most valuable post graduate experience I have had in that it is almost completely applicable to my assignment.
6	The skills acquired will be of extreme value to me. The cognitive growth in terms of new concepts and applications will be of tremendous value.
6	Personal growth. Professional growth.
6	See number 17-21 on previous pages.
5	It has given me insight into specific, direct problem solving approaches, which can be both personally, and professionally useful.

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Question 22 Rating	Question 23 Response
4	Too much structure in program. Knowledge material excellent—low commitment by some participants.
6	All previous statements apply here. In addition, the workshop spurred my enthusiasm about being involved in the consulting experience. The experience of working with Ruth and René, as well as the rest of the group, was simply fantastic.
6	Practicum experience. Theoretical framework is useful for me and my work. Do-look-learn model. Working with Ruth and René.
6	It put all the training I've had into a complete focus.
6	Preparation for my career work in staff, management and organizational development. Graduate credit. Potential for being actually helpful to the organization I work with. Personal learning and intellectual growth. Materials and resource tools.
6	Finding it valuable in my day to day work. Also, feel it has strengthened the organization I work in to the point of operating in a more coordinated manner.
5	The content of workshop was invaluable. However, some of the exercises within the workshop and the time sequences allotted to them were of less value to me.
5	Completed the PODS program. Gained additional experience and skills as an ODS.
6	No comment.
5	Material. Knowledge and manner of trainers. Workshop format. Fellow participants.
3	So much time spent at training sessions. Group members who were having unsolvable problems. The success of our team. So much travel and expense.
6	Own growth. Getting to know other trainers. Getting to know Ruth and René—fantastic people.
6	Learned a great deal. Grew personally. Really enjoyed the fellowship.
6	The total (all prerequisites) experience hangs together cognitively for me. Also I have confronted and dealt with my own skill refinements and feel more competent.

Questions 22 and 23 (Continued)

Question 22 Rating	Question 23 Response

5 PETC-III sort of rounded out my experience/training in consultation from individual to organization.

6 Good feelings, increased demonstrated skills, good friends, feelings of accomplishment and it will continue.

6 Learnings (see #18-21). Value restructuring. Joy from being part of this beautiful experience.

6 The structure and theory are very useful for conceptualizing organizational development work.

5 The mixture of cognitive and experiential learning.

6 Brought ideas and concepts together from other labs. Reinforced learnings, gave feedback to me personally and as consultant.

6 Extreme gained knowledge of OD. Extreme gained knowledge of skills. Extreme gained confidence of skills and self.

6 Excellent trainers throughout. More than adequate materials and resources. Feeling of group that has developed over time. Support of colleagues.

6 Ability to apply concepts to a variety of situations, e.g., nonschool populations/organizations.

5 Strength of trainers. Responsiveness and support of participants. My confidence in NWREL materials.

4 Amount of time spent was great—wonder if learnings could have happened in shorter period of time using different strategies. Need experiences with opportunity to put learnings into operation.

6 See #1. Because of the learning experiences.

6 New knowledge. New self-awarness.

5 Cognitive and experiential learnings already commented on.

5 I think I have had a number of experiences that have improved my confidence and skill in dealing with groups.

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Appendix D:

ÍNITIAL STATUS REPORT

Please fill out the following form as you begin your consulting
activities in order to describe your initial view of the client group.
The consulting team should complete this form as a group effort and
submit it at the end of the workshop. The form will be returned to you
by mail after a Xerox copy has been made.

1. Consultant's name:

2. Title or name of client group:

3. Number of people in client group:

4. What is the purpose or function of the client group within
    the organization of which it is a part?

5. If an organizational chart exists that shows your client's
    place in the organization, please enclose a copy. If a
    chart doesn't exist and it would be helpful to us in under-
    standing your client, please provide a simple chart that
    shows your client's relation to the organization of which it
    is a part and your own place if you are members of tha
    organization.

6. What is your organizational relation to the client?

        The client is (check one):

        ____part of my own work unit
        ____part of a different work unit in the same organization
        ____a member of a different organization (specify):
        ____other (specify):

7. Date of initial contact with client:

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Please provide an overall summary of your initial assessment by

completing the following:

Please describe the general situation as you begin to consult
including the client group's primary tasks, difficulties, and
strengths; and your probable role and primary difficulties.

Please state your goals for the clients.

Please state your assumptions and probable strategies.

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Appendix E:

EXTERNAL REVIEW DOCUMENTS

> Review Guidelines and
>   Preconference Correspondence
> Description of Review Conference
>   Activities
> Critiques by External Reviewers

I am pleased you will be part of the Review Board for the *Preparing Educational Training Consultants (PETC)* Conference in Portland, Oregon, from October 20 through October 23, 1975.

Enclosed are materials for your information; first, a brief description of PETC as well as descriptions of the other instructional systems educators complete prior to becoming a PETC participant. Also enclosed are the guidelines for your written critique as well as a roster of conference participants.

The first few days of the conference will primarily be devoted to having you become thoroughly familiar with the goals and procedures of PETC as well as briefing you on the other prerequisite instructional systems for PETC trainees. The developers as well as some PETC graduates will make presentations and be available to you as resources in preparing your reviews. During the last few days there will be continued opportunities for discussion among the Review Board and the developers and there will be time designated for you to prepare your written critique. This critique will be part of the final report for the National Institute of Education.

Reservations have been made for you at Riverside West Motel which is only a block away from NWREL for Sunday, October 19. If you will inform me of your arrival time I will pick you up at the airport. Please contact me at my home in Eugene about your arrival time or any other concerns.

We all look forward to a good exchange of ideas.

Sincerely,

Patricia A. Schmuck, Ph.D.
Research Associate
1956 Fairmount Boulevard
Eugene, Oregon 97403
(503)345-7425

The purpose of this review is to obtain expert opinion of the merit of the FITT series of instructional systems. This information will be presented as part of a technical report to the National Institute of Education.

After reviewing all three systems, please write a critique that addresses each of the questions outlined below. The critique need not be limited to these items but clear judgment of merit, positive or negative, are needed for each question.

1. What is your expert opinion concerning the merit of the rationale and goals of the FITT series. Consider:

   a. clarity

   b. logic (conceptual integrity)

   c. social significance

   d. whether important claims and disclaimers have been made explicit

   Do you have any recommendations?

2. Have the target populations been clearly identified?

3. What is your expert opinion concerning the merit of the content of the instructional system? Content refers to the skills, concepts, principles, values and issues that are the subject of the system.

   Please respond generally considering the content as a whole and noting exceptions when appropriate.

   Please consider the following criteria:

       a. conceptual adequacy
       b. theoretical significance
       c. practical significance for successful consulting
       d. empirical justification for consulting practices recommended
       e. clarity of definition and presentation
       f. appropriate emphasis of content elements
       g. adequate integration of content elements
       h. parsimony
       i. sufficiency

   Any recommendations?

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4. In general, are the FITT-II training procedures appropriate for the system's purposes, content and intended population?

   Any recommendations?

5. Is the role of the trainer clear and appropriate for such an instructional program?

   Any recommendations?

6. Discuss any positive or negative side effects you might expect from the system.

7. Discuss any additional strengths or weaknesses of the system in terms of your own criteria.

For the following questions imagine that one of your client school
systems is considering using PITT to provide an internal consulting
organizational development and training capability. Please frame your
answers in that context.

1. In your report to your client system, you are asked to compare
   PITT with some other program which you are familiar. The client
   system is interested only in programs for providing them with OD
   and training resources. Which system would you use for the
   comparison?

   Title   _____

   Author   _____

   Publisher   _____

   Why did you choose this system?

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

| FERT | OTHER SYSTEM |

COST

☐   ☐   ☐

Reasonable   Somewhat   Prohibitively
       Reasonable   Expensive

COST

☐   ☐   ☐

Reasonable   Somewhat   Prohibitively
       Reasonable   Expensive

WORKSHOP FORMAT

☐   ☐   ☐

Well   Parts   Poorly
Organized   Were   Organized
     Organized

WORKSHOP FORMAT

☐   ☐   ☐

Well   Parts   Poorly
Organized   Were   Organized
     Organized

MATERIAL CONTENT

☐   ☐   ☐

Comprehensive   Adequate   Superficial

MATERIAL CONTENT

☐   ☐   ☐

Comprehensive   Adequate   Superficial

USEFULNESS TO CLIENTS

☐   ☐   ☐

Useful   Somewhat   Not
      Useful   Useful

USEFULNESS TO CLIENTS

☐   ☐   ☐

Useful   Somewhat   Not
      Useful   Useful

Which would you recommend your client system select?

____ FERT

____ Other System

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PETC REVIEW CONFERENCE AGENDA

Monday, October 20

3:00 - 8:30 A.M.   Reviewers meet Pat Schmuck and Gary Milczarek at
                    NWREL for informal introductions.

8:30 - 9:00 A.M.   Informal coffee with PETC Reivew Conference
                    participants.

9:00 - 12:00 noon   Information meeting.

    9:00 - 9:30   Chic Jung, Director of Program, to give background
                    and purposes of PETC.

    9:30 - 10:00   Gary Milczarek, Evaluator, to go over Evaluator
                    Guidelines and clarify expectations for Review
                    product.

    10:00 - 12:00   Ruth Emory and René Pino, Developers, to present
                    an overview and key aspects of PETC I, II and III.
                    A walk through the instructional system.

12:00 - 1:00 P.M.   Lunch

1:00 - 2:00 P.M.   Reviewers meet with Gary and Pat to assess problems
                    and set up procedures to facilitate the Review
                    process.

2:00 -   Open

Tuesday, October 21

Morning   Open

1:30 - 5:00 P.M.   Reviewers meet with PETC graduates. Specific
                    content and arrangements to be made with Reviewers.

                    This meeting will take place in a home and be
                    followed by an informal dinner for all conference
                    participants.

Wednesday, October 22

                    Open

Thursday, October 23

                    Some kind of review summary with developers.

                    Some kind of conference evaluation.

                    Some kind of closure activity.

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2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	TETA		OTHER SYSTEM:	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST				
WORKSHOP FORMAT (Including ease of Implementation)				
MATERIAL CONTENT				
PROBABLE SHORT-TERM EFFECTS				
PROBABLE LONG-TERM EFFECTS				
USEFULNESS TO CLIENTS				

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September 29, 1975

By now you should have received my letter, the contract, the brief
description of PETC and under separate cover, the entire PETC package.
Since the package weighs a lot and is inconvenient to carry, we will
have another one for you in Portland.

We see the purpose of the PETC Review Conference to facilitate your
task of writing a summative review of the PETC instructional system.
Furthermore, we understand the enormity of the task we ask--to review
a system requiring several weeks of participant commitment. Therefore,
we have left much of the conference time open so it can be arranged
according to your needs to get the job done. We believe certain
decisions could not be made without consultation with you and other
reviewers since you know how your time could be spent most profitably.

We have arranged a minimum of pre-planned activities that we think will
be helpful to you. Although there are only three meetings planned on
the Review Conference Agenda, the developers will be available during
the whole conference period. It will be up to you to determine how
much dialogue and interaction you wish to have with them.

Included is the agenda for the conference as it stands now.

Again, please let me know your arrival time and I will plan on meeting
you.

Sincerely,

Patricia A. Schmuck
Research Associate

PAS:s

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PITT Conference Participants, Portland, Oregon, October 20-23, 1975

Review Board

Ann Burr, Elementary School Teacher, member of the Cadre of
Organizational Communication Consultants, Eugene, Oregon

Bunyan Bryant, Associate Professor, School of Natural Resources,
University of Michigan; formerly member of the Educational Change Team

Gene Mulcahy, Trustee to the Knox Foundation, Assistant Superintendent,
Hartford Public Schools; formerly Director of Shanti School, Hartford,
Connecticut

Ronard Wilson, Consultant, Spokane, Washington; formerly UNESCO
Consultant for training and member of Human Development Institute,
Atlanta, Georgia

PITT Development Staff

Charles Jung, Program Director
Ruth Emory
René Pino
Richard Arends
William Ward
John Lohman

PITT Evaluation Staff

Gary Milczarek
Richard Arends
Patricia Schmuck
Jane Arends
Warren Bell

PITT Graduates

Tom Wilson
Jim Forneris
Cecelia Tompkins
Walt Stickel

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Description of Review Conference Activities

On the first day the following people made presentations about PETC and the review procedure:

1. Charles Jung, Director, presented the Purposes and Goals of PETC

2. Ruth Emory and René Pino, Developers, presented an Overview of PETC

3. Gary Milczarek, Evaluator, discussed Product Expectations for a Summative Review

4. Richard Arends, Evaluator, reviewed Evaluation Results of PETC

Time was provided for the reviewers to begin their study of the materials and additional plans were made for the remaining days of the review conference.

During the first day of the conference the agenda had been arranged for maximum input from the NWREL staff involved in PETC. There were times allotted for formal presentations and for dialogue between the Reviewers and the PETC staff. By the end of the day the expectations and work tasks were clearly delineated and the reviewers collaborated on the conference agenda by determining their needs for further discussions, feedback and work time.

On the second day work time was provided for the reviewers in the morning. In the afternoon the Review Board met with five graduates of the PETC series.

The reviewers designed the afternoon for maximum learning about the experiences of five individuals who had participated in PETC. The reviewers requested that no member of the development or evaluation staff be present and only Pat Schmuck, the conference documenter, was allowed. The agenda for this meeting included:

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1. Introductions (20 minutes)

2. FETC Biography for each graduate (30 minutes)

3. Subgroups (45 minutes)

   Reviewers and FETC graduates broke into subgroups to focus on one instructional system each.

4. Fish Bowl: Reviewers met inside and talked about their impressions, concerns and perceptions of strengths and weaknesses.

5. Fish Bowl: FETC graduates met and reacted to the statements made by the reviewers.

6. Debriefing of Total Group

The five FETC graduates included (a) Tommy Tompkins, Administrative Assistant, Metropolitan Learning Center, Portland Public Schools and FETC participant; (b) Walter Stickle, Staff Consultant, Sellwood School, Portland Public Schools and FETC participant; (c) Tom Wilson, Assistant Principal of Curriculum and Organization Development, Newport High School, Newport, California and Installer in the Orange County area for several workshops; (d) Robert McGlone, Executive Director of Training Enterprises New Techniques and Senior trainer for three FETC-II workshops; (e) James Forneris, Associate, Training Enterprises New Techniques, formerly with Seattle Public Schools and Installer for FETC in Seattle.

The third day consisted of reviewer work time and a reviewer feedback meeting. Reviewers met with program developers and evaluators for the purpose of presenting their preliminary conclusions about the strengths and weaknesses of the FETC system. This provided an opportunity for developers to share additional information and perceptions and for reviewers to seek clarification where needed.

The fourth day of the conference included reviewer work time and an evaluation of the conference. The Review Conference was evaluated

highly by reviewers and program staff; everyone concurred that it had
been a useful, productive and exciting conference. The structuring
of the conference allowed sufficient time for reviewer deliberation,
reading and writing.

Review of the PETC Program

Dr. Bunyan Bryant
October 23, 1975

The series of programs designed to train educators with high level
skills in organizational development was relatively well done, highly
integrated and professional. It is evident that much forethought and
energy went into the conceptualization and integration of these training
materials; the nature and organization of such materials clearly indicated
that they were designed to train those involved in school related organi-
zational problems. To date, little has been done in viewing schools
as organizations that are unique and crisis-ridden. Traditionally, the
underlying structural assumptions of educational institituions have been
treated as less important than isolated individuals or groups located
within the organization itself. Too often we explain organizational
concerns in terms of a particular indiviudal's withdrawal of emotional
support from organizational goals and objectives, instead of the institutions'
contribution to alienation and nonproductivity of its members.

The rationale for preparing organizational development specialists is
both sound and much needed. The PETC system trains educators in OD to
provide school managers with appropriate skills or resources at costs
most reasonable than hiring external consultants. However, the rationale
for providing OD skill training to school managers assumes that they are
interested in using the technology to enhance humane aspects of quality
education. Often the preoccupation with student control rather than
improved education becomes the issue. Therefore, it is important to train
not only school managers or teachers, or students, but certain types who

are interested in using the skills in ways that the designers of the training packages feel appropriate. Perhaps training students, teachers and administrators to serve as check points for each other may be worthwhile considering.

The training materials presented provide both logic and clarity with respect to instructional objectives and planned activities. Yet one has to be conscious of potential biases that are inherent within the system. For instance, the designers of the training materials referred to therein were probably white-affluent-male-adults, who were products of western culture and who were politically or culturally insensitive in conceptualizing interventions for social justice. Few references within the PETC programs were made to minorities or women—nor were there training designs by such groups. In addition, some of the designs particularly in PETC-I have been around for some time; they do not take into consideration the issues of racism, ageism, sexism, classism and ethnocentrism. Although well intended, the PETC programs may set the conceptual or theoretical framework for skillfully supporting or maintaining deep-seated cultural patterns. Even minorities often fall prey or implicitly agree to this conceptual or theoretical framework that is not always in our best interest. Yet it is unfair to "lay" this on the PETC system. Such issues are raised not to browbeat traditional white male consultants or the PETC programs, but to raise the level of consciousness. White males have had a tremendous impact upon all those involved and few attempts have been made to look critically at the shortcomings of well-established OD models or their uses.

The above issues are important: multiple forms of injustices are found at every level of the school fostered by complex organizational arrangements or personal or cultural or stylistic ways of behaving that

maintain majoritarian codes of conduct. An index of measuring the amount and extent of oppression found within the school is to diagnose how the school treats its students, women, minorities, and ethnic groups. In order for PETC to become more socially significant, it must become more sensitive to issues of social justice and involve minorities and women to more equally share the technology. This is a first step in addressing the biases that may be found in the "crevices" of the conceptual designs and their uses.

Although social justice issues were never outrightly disclaimed, the designers of the training programs clearly stated that the PETC program was not an encounter group, nor a sensitivity training group, nor did completion of the program necessarily qualify one to consult with organizations, nor was it appropriate for "pathological schools." The designers of the system claimed to be able to train people to do effective CD work in certain schools depending upon the school's profile and readiness for change. However, it was interesting to note that one of the graduates felt that PETC could be used regardless of the condition of the school. The evaluator, however, tends to agree with the designers in that there are certain schools where the PETC program would be less than adequate.

Based upon the above, it is recommended that: (1) PETC pay particular attention to racial and sexual biases of training models that are in use or change them if appropriate; (2) PETC select more minorities and women and students so that they can gain access to technology as a means of a strategy intervention that begins to deal with issues of social justice in schools; (3) PETC make a conscious effort to include or design other training models that deal with the issues of social justice and state how present models can be misused in subtle ways to more adroitly support oppression.

PETC target population raises the issues of social justice too. At one level the target population is fairly clear, but at the level of radical and sexual composition it is not so clear and needs to be dealt with more explicitly. In fact, high school students, too, should be a part of the target population, even though they are involved in some of the more basic programs. Often as adults we feel too threatened to learn from students; working through and learning how to deal with such feelings could be an important part of the program.

In spite of PETC shortcomings, it is probably one of the best conceptual and integrative organizational change and development pieces to date. As mentioned before, much forethought and integration and work has gone into its development, as indicated by its clarity, purpose, and organization. The need for this kind of training package is long overdue as indicated by the school's victim-blame approach to academic failure. Even though issues listed below are not specifically taken up in PETC, it is important to ask questions such as: (1) what kind of skills does one need to work effectively with oppressed groups; (2) is one always accountable to school management or can one be accountable to students rather than management. The questions listed above are important and should be dealt with more thoroughly.

The PETC system was clearly organized into a meaningful whole, integrating skills, theoretical concepts, and activities that went from simple to more complex. One graduate from the program stated that more skill-building could have gone on in RUPS in preparation of PETC-I, but was not a major problem. PETC-II builds off of PETC-I with some appropriate duplication of skill-building. The last program in the series raised some issues such as: (1) too much information to be digested and understood within the context of the training experience, (2) a clearer definition indicating the

differences between theories, conceptual models and hypothesis, (3) more time to deal with multiple organizational development models within the training event, and (4) an improved start-up design to help support those trainees with issues of strategy intervention.

Throughout PETC the trainer provides learning situations for the trainees, in fact, places a value upon this kind of learning. In PETC-III the trainer takes a more active role in disseminating information along more traditional pedagogical lines, but the training provides few visions of new schools or visions for _ideal_ organizational change and development outcomes, or visions of a sexless or raceless school, or visions of a system of accountability of teacher and administrator to students or parents. Yet the consultant or trainer is constantly attempting to influence diagnosis and organizational outcomes. It seems that the consultant could also influence school systems to experiment or adhere to organizational structures that would be more accountable to and rewarding for organizational members. Without visions of new schools, PETC is deficient and places the consultant at great disadvantage with respect to influencing certain kinds of organizational change and development. There are some schools around that could serve as models even though few deal with large groups of student, teacher and administrator populations.

Will all this lead to successful consultation? This question is difficult to answer in that it really depends upon who decides success, i.e., the adult culture of the school or consultants, or students. There may be situations where the adult population of the school perception of success is at variance with the student perception of success. Traditionally, the adult culture has constantly defined success in terms of academic achievement rather than student satisfaction. The point can be most cogently

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illustrated by the PETC part of NWREL. Does an external evaluator define success by applying statistical analysis to behavioral outcomes or do trainers of the PETC program define their own success in terms of personal satisfaction reported by trainees? Often those who have the power will determine the criteria, method and success of stated goals and objectives. Yet many policy decisions have been made in the absence of quantitative data; we have to decide whether scientific technology transcends or subordinates itself to educational values.

What about negative or positive side effects? With respect to the former there are several negative side effects that could result from a system. These are: (1) using the technology to skillfully maintain racism, classism, sexism, ethnocentrism, (2) using the PETC system without fully developing the necessary skills to consult to school systems, (3) disseminating the technology in ways that do not involve oppressed groups so that they may not be able to defend themselves against its misuse, (4) using the PETC system in ways that foster dependency of the client upon the consultant, (5) using only parts of the system or the various training programs out of context, and (6) focusing on this model at the exclusion of alternatives. Some of the potential or positive aspects of this training mode were: (1) including or juxtaposing training designs to deal with the issues of multiple oppression, (2) disseminating materials or training minorities, women and students to more effectively deal with rancorous school conditions, and (3) using PETC materials to change the curriculum in schools of education. These are some of the major side effects that could come from such a program. Other side effects are involved in the role of the consultant or trainer.

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There is little indication that trainers are aware of their partisan
or political role within a participant group. It is more than trainer
biases but the "political correctness" of the trainer with respect to
strategy interventions at the group or system level. Too often we are
taught to recognize our biases and encouraged to be value neutral and
objective. Often the difference between a trainer or consultant and an
advocate is that the former usually has a contract with established
power (and whose partisanship is more supportive of), while the latter
usually has a contract with nonestablished power (and whose partianship
is more above board and more supportive of). Clarity of these issues
is important to trainers and graduates of PETC.

Why raise questions of social justice within the context of this
evaluation? Not to raise such a question would be an injustice to the
evaluation and it might encourage those in the PETC system to continue to
circumvent the issues raised herein. We cannot afford to do that. The
increasing rise of technocracy, the unequal distribution of wealth and
power, the high rate of unemployment and underemployment among the poor,
the elderly minorities and women, the loss of faith in many of our govern-
ment incumbents, the corporate influence on our professed democratic process,
the historical relations of exploitation of the third world leave many
students and the disenfranchised frustrated, confused, and alienated.
Contradictions in our history or democratic life or the free enterprise
system are visibly disturbing. Often students distrust those who are the
personification of policies and values that produce alienation and despair.
It is clear that the school does not operate in a vacuum and the macro
forces of society have a tremendous impact.

Obviously, it becomes important that consultants seriously consider their values, goals and constituencies, roles and stylistic behavior. Those "trapped" in esteemed hereditary roles and socialization may more often opt to serve establishmentarians. Those who are interested in new consciousness or new training interventions will have to begin to understand more fully the macro economic, social, political forces that perpetuate or exacerbate social injustices. Such an undertaking will undoubtedly require personal risks, time, retraining and improved conceptual theories. But let's not get hung up on the latter or as Martin Luther King said "paralysis of analysis or unnecessary head scratching and plunge in wholeheartedly." The conceptual design of PETC can be helpful, makes an important contribution to that process if used "correctly." It is important to get such information in the hands of those interested in gearing up for social justice. In spite of the shortcomings of PETC, it does make a major contribution to the field in training individuals to do organizational change and development work in schools. What we need to do is to continue to build off these conceptualizations and make changes where necessary and watch out for potential biases that stifle rather than facilitate personal or academic or organizational change and development. This we can do.

(No alternative was received.)

Review of PETC I, II, & III

by Ann M. Burr

The rationale for the PETC series is very clearly presented in the
Central Ideas Book that accompanies PETC III. The idea that planned, dynamic
change is possible and that it will be the result of the use of these three
programs is a stimulating one. As an educator I readily accept the need for
such change and agree that the task is enormous. The goals of each program
are also well defined and presented in a way that makes sense to the reader.

I have no quarrel with the idea that people need the skills of under-
standing relationships, of seeking change, and of dealing with complex
technology. These are indeed socially significant. I am uneasy, however,
with the unintentional outcome of the three programs—that not all people
have equal access to the training. This, too, is socially significant!
Because the programs are designed for specific populations who have positions
of leadership, who have extensive previous training, and who have the time
and resources to take advantage of PETC, trainees will largely represent
Establishment—particularly white males. With intentional effort to recruit
women and members of other races, and with some plan of financial assistance,
this discrepancy could be corrected.

The claims and disclaimers are explicitly stated, particularly in the
Central Ideas Book. The emphasis on the limitations of training in PETC I
and II (that participation in the programs does not prepare an individual to
be a trainer for the programs) is clear.

The authors had the target populations well in mind (except for the
exceptions mentioned previously), and they are clearly presented in charts
and in the text. I have a personal bias about limiting opportunities for
training to the specified people in a particular role. I would not exclude
any school or community personnel from entering the training, assuming that

the content and purposes had been carefully outlined to each person and that he or she accepted the responsibility for his of her learning. This, however, could be done by the implementers of a program; it is not the specified intention of the authors.

The content of the three programs is impressively concise and clear, yet outstandingly comprehensive. I have developed some minor learning packages for classroom use, and I can appreciate the many hours represented--hours of writing, trying out programs, and rewriting. In my opinion the programs will do what they say they will do--train a person to be an Educational Training Consultant with many skills and knowledge of their use. It is made clear that these skills do not include training in human relations workshops, but the materials do not state a recommendation that such training would be helpful or necessary for a truly competent consultant. I suggest that such a statement be included somewhere in the materials, perhaps as an addition to the section on prerequisites and limitations in the Central Ideas Book and also added to the requirements sections in introductions to the various programs.

The concepts are based on sound learning theory--that learning is most effective when the learner is actively involved, when he or she is given immediate feedback on actions, and when the learner is a voluntary one. There is another facet of learning research that shows that a person learns most effectively when he or she is involved in the design for learning and has some choices offered in ways of attaining a goal. A program designed to be taught by a fairly untrained person--such as the IPC and RUPS programs-- has to restrict choice, but I'm wondering if the Senior Trainers in PETC II and III could involve the participants a bit more in the plans for their own training. This comment stems from statements made by some graduates that the material presented in PETC III was a conceptual overload. It is possible, though, that this problem has already been taken care of in the sending out

of materials in considerable advance of the actual first workshop of PETC III. I would still recommend that Senior Trainers make an effort to introduce the programs in such a way that participants feel included in the planning and not "done to".

None of the graduates that met with us complained that the material was too wordy or irrelevant, and in my review of them I found no instances of such. The references are sound, the exercises are appropriate, and the sequence of activities appears to be logical. There is no doubt in my mind that the trainees will find their training practical. The best of all worlds for an educator is one in which he or she can actually apply techniques in a "back home" situation. The graduates assured us that the techniques do indeed work.

For the most part the material contains a minimum of sexist structure. However, on page 1 of the Central Ideas Book and in the Introduction to PETC III: Organizational Development Training, there are statements describing the consultant as "He" and the practices as "his." I would strongly recommend changes in all such instances! I also object to the tendency to refer to classroom teachers as female and administrators as male--as Ms. Jones in the RUPS package--but I will try to confine my remarks to the PETC Programs.

The training procedures in all the PETC packages seem entirely appropriate since they are meant to be used in a specified way. The role of the trainer, too, is explicitly outlined and deviations are certainly not encouraged. For me, such a method would become untenable. I find that I can only perform instruction the same way once or possibly twice; after that, I add or subtract or change methods readily. This is a personal preference, and is significant only for possible trainers who have similar preferences. If a trainer felt the need, he or she could certainly change some of the sequences and, in my opinion, the results would be comparable.

There are many positive side effects that could come from use of the PETC systems. Change would be planned ones that came from within the organization. Clients would receive assistance in a variety of ways, not just one "tried and true" method. The plans for change would include input from various members of the organization and would be based on internal goals. A side effect from all this would be that members of the organization would feel included; they would also feel proud of the results.

An unfortunate side effect of the system is that minority groups may feel even more alienated, since the leadership represents the establishment. It is possible, too, that the Consultant has been trained without sufficient self-awareness of a personal nature. Even more likely, though, is the situation in which the hidden, subtle problems remain unsurfaced because the PETC graduate had little training in awareness of issues of social justice—issues which can be unintentionally perpetuated. The addition of some current social issues into the PETC material would be crucial!

From my own experience in the classroom and from the comments of the PETC graduates, I am sure that the concepts presented become really _learned_ information through teaching them to others. This is not a given in the last two packages. I see no way around this, except that by being a cotrainer a graduate could then solidify his or her theoretical constructs by being a Senior Trainer.

These programs can, with the few additions mentioned, be of tremendous value to organizations that are aware of problems and have no trained internal consultants. They have been carefully and skillfully constructed. Congratulations!

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

Title   <u>Handbook of Organizational Development in the Schools</u>

Author   <u>Schmuck, Richard and Phil Runkle, et al.</u>
<div align="right">(soon to be</div>
Publisher   <u>Mayfield Publishing Co., Palo Alto, 1971 revised)</u>

Why did you choose this system?

     First of all, I'm assuming the client system to be a school district, and I would suggest merits of this system <u>and</u> those of PETC. The school district, then, would make a decision.

     Dick Schmuck's method of developing a series of cadre of internal consultants provides a feasible alternative to the PETC programs because:

     (1) the costs are lower,
     (2) the installation time is shorter,
     (3) the resulting consultants represent all levels of a school's population, not just management, and
     (4) a wide variety of changes are possible within the first year.

     This "Cadre" would use materials described in the <u>Handbook</u>, plus other materials, to train others in the school district. Their original training would involve the cost of external trainers (as would that of a PETC Program) and whatever costs of internal training of the Cadre required to bring in new members...or new ideas...during the first year. The PETC Programs require external consultants as each program is introduced during a three-year period.

     Cadre activities are geared so that students are involved (IPC, RUPS, etc., <u>can</u> be used this way, too, with modification) and can become trainers. This is also true of custodians, cooks, secretaries, parents, teachers, plus administrators; PETC tends to be useful only for administrators or personnel, such as counselors, who have no classroom assignment or classified job.

     Cadre training includes methods and materials to encourage personal growth as well as professional competency.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC STRENGTHS	PETC WEAKNESSES	OTHER SYSTEM - Internal Cadre STRENGTHS	OTHER SYSTEM - Internal Cadre WEAKNESSES
COST	Initial investment includes a package that can be reused many times. Trainees would most likely include personnel who do not need paid substitutes.	Initial investment is large (cost of packages plus cost of trainers and trainee-time).	Initial investment does include packages--does include trainer and trainee-time cost.	Trainee-time costs could be large because trainees include certified and classified personnel who might need release time.
WORKSHOP FORMAT (including ease of implementation)	Planning time for trainers is likely to be less.	Less opportunity for suiting workshop to specific needs.	Opportunity to design, with participants, a workshop that is flexible in length and format. Planning time becomes a learning situation.	Planning time is likely to be lengthy.
MATERIAL CONTENT	Well thought out. Concise, comprehensive. Evaluation data available.	Somewhat restricted (this depends upon the trainer and his/her expertise).	Wide variety available. Well thought out. Comprehensive, concise.	Material has to be pulled together from available files. Previous evaluation unavailable for specific design.
PROBABLE SHORT-TERM EFFECTS	Skills of system's personnel would be enhanced the first year. Problems in classrooms, work groups, and schools could be dealt with...in the first year. Introduction of skills would be thorough.	Progress (assuming that the IPC, etc., were begun on basis for PETC) would be spread over a three-year period.	Skills of system's personnel would be enhanced the first year. Problems in classrooms, work groups, and schools could be dealt with...in the first year.	Trainer-time would be heavy during short-term.
PROBABLE LONG-TERM EFFECTS	Change could be instituted in a district system within a three-year period of time. The trainers are highly skilled (PETC-I, II & III are completed).	Trainers still needed on PETC packages are introduced. Highly skilled trainers are probably few, and all from management.	Change could be instituted in district system within a one-year period of time. Trainer-time very small; internal people take over. Trainers include students, principals, parents, etc.	A variety of skill level existent in Cadre; 4 or 5 new people coming for training each year.
USEFULNESS TO CLIENTS	School district can count on help from skilled consultants and depend on many personnel being skilled in communication, problem solving, decision-making, and conflict management.	Change may not have involved efforts of all levels of school people. Change may be minimal from point of view of students and parents.	School district can count on help from skilled consultants and depend on many personnel being skilled in communication, problem solving, decision-making, and conflict management.	Change may be more revolutionary. Change may have been based on various models, some cognitive, some affective.

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC	OTHER SYSTEM

COST

☒	☐	☐
Reasonable	Somewhat Reasonable	Prohibitively Expensive

COST

☒	☐	☐
Reasonable	Somewhat Reasonable	Prohibitively Expensive

WORKSHOP FORMAT

☒	☐	☐
Well-organized	Parts were Organized	Poorly Organized

WORKSHOP FORMAT

☐	☒	☐
Well-organized	Parts were Well-Organized then brought together.	Poorly Organized

MATERIAL CONTENT

☒	☐	☐
Comprehensive	Adequate	Superficial

MATERIAL CONTENT

☒	☐	☐
Comprehensive	Adequate	Superficial

USEFULNESS TO CLIENTS

☒	☐	☐
Useful	Somewhat Useful	Not Useful

USEFULNESS TO CLIENTS

☒	☐	☐
Useful	Somewhat Useful	Not Useful

Which would you recommend your client system select?

_____ PETC first and then

__X__ Other System

I would recommend the Cadre system because it offers people an opportunity to be involved in the changes that happen to them. PETC Programs, as now written, result in the Consultant role being a management position.

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Review of the PEIC Program
(And Comparative Analysis)

Gene Mulcahy, Ed. D.
Oct. 23, 1975

I. Review of the PEIC System

The structure of this section of the review is three-fold. The first
section is a consideration of some of some of the factors in the review
itself and in the review process with the attendant implications of
threats to validity. The second section is a delineation of perceived
strengths and weaknesses in the program and the third section is a
specific response to the expert review guidelines as conceived by the
program's evaluator.

Section 1: The Review Itself

The four reviewers over a period of four days had some significant
advantages as the task of the review of the PEIC program proceeded. One
such advantage has been the availability of resources, including
developers, evaluators, graduates, some statistical and evaluation data,
and access to program developmental administrators. The processes of
selection and congregation of the reviewer group would seem to have
been effective in that the group was a collection of people balanced
from the perspective of a number of identified variables. The
differences in the members of the group provided unique perspectives
and insights into the tasks assigned and yet the group itself functioned
in a most compatible and constructive fashion with the group's own
process and data sharing sessions being of great value.

Serious effort was made by the PETC development and evaluation
staff personnel to meet reviewer needs. This included a high degree
of commitment and energy to support and facilitate the reviewer tasks.
The dialogue throughout the review between the reviewers and personnel
connected with the PETC development program, and graduates of the PETC
system has been honest and open. All interviewed displayed a non-
defensive posture and an earnest effort to respond to reviewer query.

There have been, however, some ongoing difficulties with the review
and the review process. The most serious difficulty for us was the
magnitude of the materials to be reviewed and the relatively limited time
in which to review them. The materials themselves, physically occupy an
8" x 12" space several feet high. To expect us to provide a sensitive
reading, synthesis, and analysis of these materials in the time offered,
was an unreasonable expectation. We have sought to achieve the task
none the less, and designed processes for the maximum possible access to
information in minimal time.

Likewise, some resources were not available, and some sources were
accessible only for limited time. Because the long term evaluation
process is in a continuing state, much of the data we perceived as
desirable, was not yet available.

Given the limitations placed upon the reviewers, the value of the
review itself is limited as a source of major influence in decision-
making relative to further development in the program. This caveat,
however, does not apply to some of the philosophical, social, and value
issues raised.

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Section 2: Strengths and Weaknesses of the PETC Program

Strengths

- Comprehensive
- Organized and integrated
- Humanistic
- High quality of material contained
- Emphasis of practicum
- Reasonably skilled people can be trainers
- Has early opportunities for practicing skills
- Includes a design for supervision
- Emphasis on understanding process
- Selection of consultant practicum experiences allows for trainee
  choice in areas of interest and style
- Well designed, offers support and structure
- Opens up trainees to research
- Offers a planned way to affect change
- Provides powerful tools
- High degree of clarity and integration of materials
- Use of groups and devices for trainee interaction
- Understanding of the value of conflict in growth
- High degree of structure, in some senses, extends the opportunity
  for choice and protects the risker

Weaknesses

- Does not address concerns of social justice
- Seeks to be value neutral
- Culture bias
- Elitist
- Phrased in sexist language
- A system based upon materials, rather than people
- Cannot utilize resources as they appear
- Trainees are in some ways expected to have white-middle-class
  values and experiences
- Trainees expected to be "system oriented people"
- There are no criteria for determining equivalency
- Weak on behavioral objectives
- Evaluation of behavior change not sufficiently well-developed
- Evaluation of consultant competency after graduation not sufficiently
  developed
- Client system groups are sometimes exploited
- Client system groups are sometimes artificial
- No process for assisting client systems to define needs and
  effectively use consultants
- Entire system lacks trainee needs assessment for training component
- No pre-assessment of skills or skills level
- Weak in the affective domain
- At some points, trainees report confusion relating to their not
  understanding the total system and relationship of parts thereto

- The time alotted for the program may be insufficient for the material to be learned
- In PETC I practicum there is no visible means of dealing with incompetent and unprepared leadership problems except for the co-leadership model
- Sometimes the timing of the introduction of new materials seems inappropriate
- The package is not open to in-flight correction by trainees
- There seems to be a need for a better overview of the total package

Section 3: Responses to the Expert Review Guidelines

No. 1 The merit of the rationale and goals of the PETC series:

a. Clarity: Although there seems to be some difficulty in the trainee's perception of the various parts of system as he or she proceeds through the system, the program itself evidences a great clarity of the total. This clarity is one of the most impressive aspects of the system. The PETC training system is like a carefully and delicately woven tapestry. Its remarkable and clear design is evident in its total. It has been artfully and lovingly constructed with a high degree of technical competence.

b. Logic: The sequential conceptions follow a consistent and logical pattern. The introduction of concepts and practice of that concept is generally highly appropriate and constant. A comprehensive, humanistic organizational development and change strategy has been devised and presented with painstaking care according to well-reasoned sequences.

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c. Social significance: It is in this area that one of
the major difficulties of the program lies. The PLTC
system does not concern itself with the issue of
values. It seeks to be value-free and equally
applicable to all client systems. It ignores the fact
that many systems are by goal and practice, unjust.

One primary client of the PLTC system is the American
public school, and yet the American public school is
designed to offer the tools of success to the privileged,
thereby enforcing oppression on ages, sexes, race and
classes not included.

The school and the society with which it is inter-
dependent are at base supportive of an elitist
minority. The important changes we are compelled to
consider in America are basic changes in the social
stratification, the access to information, and the
availability to tools to a total population. The PLTC
system can be used effectively to support the racist,
sexist, ageist and classist goals of the society at
large and its educational system.

Consideration of these social, ethical questions of
reform and revolution is not forthcoming either in
the rationale or the design of the program. The fact
that the materials in the program themselves show
consistent evidence of sexism in language is a further

support to the lack of consideration and concern in
the development of the program for these vital social,
political and cultural issues.

Johnathan Kozol, in his criticism of the free school
movement and philosophy, suggested that this nonsystemic
system of learning was analogous to the purportedly
amoral behavior of German people of good will during
the Third Reich. He suggested that these schools
would peacefully build their birch bark canoes in the
black forest while the Nazi ovens functioned a few
miles away. The development of amoral products in
education and the PETC product in particular, because
of its value, is capable of functioning in a moral
vacuum.

Another issue related to social significance is the
failure of the PETC system to deal with the issues of
affective growth. Clear behavior objectives should
be established and processes designed to bring about an
affective growth component in the program.

d. Claims and Disclaimers: The claims and disclaimers in
the program are clear and well stated. The program,
in fact, is somewhat humble in its claims. The potential
and actual, in the package, transcends the claims
made for it. Disclaimers have been appropriately stated.

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No. 2: Identification of target populations:

There is a clear definition of appropriate target
populations for the various components of the PETC
program. The success of this identification has been
verified by the fact that a high percentage of PETC
graduates are in fact engaged in organizational development
consultation work.

The difficulty, again, is a social problem. The
assumption in the determination of target populations is
an assumption that the consultant will be a well educated
person with middle-class white values of some financial
means. This assumption is a key determinant in the
identification of target populations.

There is no consideration in the program for the fact
that the appropriate organizational development consultant
in a situation may be a student, or a black parent, or a
member of the community not skilled in the jargon and
concepts of the educationist. The program, then, can be
guilty of establishing a consulting elite of the same
class and values as those purported within the social and
educational system. This condition mitigates against
change and reinforces the racist, sexist, ageist and classist
bases of the system.

No. 3: Content: Skills, concepts, principles, values and issues

    a. Conceptual adequacy: The system has developed a
       humanistic and comprehensive organizational development
       strategy which is unique. The concepts work effectively,

both apart from and together with each other. The
use of the practicum to reinforce the principle is
impressive. Although we had no opportunity to observe
it on a functional level, it is an excellent means of
teaching, practicing and reinforcing learning.

b. Theoretical significance: The system is unusual for its
humanism and insight into systems and strategies for
changes within systems. It is a structured program
supporting a fair amount of freedom and choice within
the structure. In some senses, it is not sufficiently
close to its own consulting design. It does not in its
own design follow the principles it recommends to its
trainees for the development of their own consultation
designs.

c. Practical significance for successful consulting: A
wide range of skills are made available to the consultants
through the program. These skills can be employed in an
impressive range of ways and in varying situations.
The program effectively teaches these skills. Graduates
report that they have used the skills taught and find
them highly satisfactory in their consulting work.

d. Empirical justification for consulting practices:
The project has apparently not had the resources available
to it for testing to the level of significance desirable
in creating empirical justification for the system itself.
Two further developments are required: (1) a further
effort to determine client satisfaction with the

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consulting skills of graduates. (This involves the
continued use and monitoring of logs and instruments
of evaluation on a consistent basis.) (2) Further
sophistication of measurement instruments in their
application to determine behavior change in graduates
and in the client systems they serve.

e. Clarity of definition and presentation: The PETC system
maintains a high degree of clarity of definition and
presentation. Descriptions are simple, straightforward
and clear. Rationales are clearly and simply stated.
The transition from theory into practice should be
consistently and efficiently achievable. The training
system can be affected by reasonably skilled trainers
and does not require highly technical and highly
skilled instructors and supervisors.

f. Appropriateness of content elements: Based on the
insufficiency of this review, a single reading of the
PETC materials and a cursory reading of some of the
other segments of the total package—content seems
appropriate and useful. The product combines the careful
presentation of researched exercises and new materials,
all are combined in a consistent and helpful manner.

g. Integration of content elements: Both from the reading
and the testimony of graduates, integration of the
materials seems well developed. The lack of preassessment
instruments and a systematic means of determining trainee
skill level and equivalency remain a problem.

h. Parsimony: Some graduates feel the total program
should extend over a longer time because the quantity
of the material commands this. The decision of the
time, of course, is the individuals. If more data on
the total concept and program in a more articulate
system of self-monitoring were designed, that decision
would be made with better data.

i. Sufficiency: The package is a comprehensive and
articulate skills design. Adequate concern for issues
of social justice and affective growth is absent.

No. 4: Appropriateness of PETC-II procedures

Cne of the very impressive things about the PETC-II
materials is the clarity of definition of the role of the
consultant and the definition of the parameters of the
consultants' responsibilities. One deficiency in the
PETC-II system is the potential for exploitation of client
system groups and the possible artificial nature of those
groups used as a training device. The identification and
definition of these client systems is a skill requiring
extraordinary sensitivity on the part of the trainer or
senior trainer and is a serious potential weakness in the
system.

Another potential difficulty in the PETC-II program
is the entry into consulting relationships. The program
does not seem to offer sufficient support and investigation
of the difficulties in establishing client relationships.
Neither is there sufficient concern given to the development

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of strategies for client system readiness in the effective
utilization of a consultant, a role of the consultant
him/herself.

Finally, a reading of the system absent from an
observation of its practice suggests potential difficulty in
the trainees moving from concept to intervention. It is not
clear how this movement is made and what supports and
supervisions are available to the trainee in making this
leap.

No. 5: Clarity of trainer expectation

This is an area of strength in the program. The
function of the trainer in PETC-I and PETC-II is that of
facilitator. The trainer is clearly expected to facilitate
individual growth and group growth in training skills. In
PETC-III it becomes very clear that the role of the trainer
changes, becomes more judgmental and more instructional in
the presentation of the content ideas toward the philosophy
of organizational development and a strategy for
implementation.

This change of style leads to the question of the
credentialing of trainers and the delineation of skills
trainers might be expected to possess. Graduates who have
been trainers reported great difficulty in the development
of criteria for trainers for PETC-III. Therein, may be a
problem for the system, for the PETC-III trainer must have an
extraordinary ability as an organizational development
theoretician and practitioner. The trainer in this third
system should be the kind of super person with extensive

background in organizational development consultation which the program avowedly seeks to avoid. Indeed, the very quality of the description of the role in its dimensions makes the identification of the appropriate trainer a matter of great difficulty.

No. 6: Positives and negatives

Responses to this question and to the succeeding one are implied in the section of this review entitled "Strengths and Weaknesses." From a technical product perspective there are no serious negative side-effects perceivable, except for the possible negative side-effects relating to premature group leadership responsibility in the second week of PETC-I. The difficulty perceived in this review is the political, economic and cultural difficulty expressed in response to several of the queries. This problem and the attendant amorality of the system is the most serious problem encountered. Unless some solution to that problem can be designed into the system, then the system itself may be both very valuable and potentially very dangerous.

The problem suggests the dilemma of Albert Einstein expressed in his famous letter to President Franklin Roosevelt. He created that thing with his genius which he believed would be of benefit and help to the entire world, yet he correctly perceived that the use of the precious gift of his intellect and insight was in a destructive fashion. Unless it is possible in some way to revise the

system so that the issues of social justice are clearly
addressed, then the system itself fails in its goal to
facilitate organizational, developmental consultancy for
change.

II. Comparison of the PETC System with Another Organizational Development Training System

The system selected for comparison with the PETC program is one which
is based upon a somewhat different set of assumptions. First, these
assumptions will be delineated, then the system will be described and
finally a comparison will be offered using the descriptors designed
by the PETC evaluator.

Section 1: Organizational Development Consultant Training Package Assumptions

1. An articulated program of trainee role definition and needs
   assessment must precede a training design.

2. Clear behavioral objectives must be established by trainees and
   trainer prior to designing the training program.

3. A trainee designed training system responsive to trainee
   identified priorities is an effective approach to organizational
   development consultant training.

4. A comprehensive training program should include training in
   resource development.

5. Internal and external resources should be used in the training
   program.

6. If the trainees have ownership of the design, choice about the
   direction and control over "inflight" correction possibilities

in the training system, then investment in the training experience itself will be high.

7. The skills of ongoing personal and skill growth should be taught as part of the training system.

8. An organizational development consultant training package in contemporary America must place emphasis upon the burning issues of social justice which are key issues for the school and for the society with which the school is interdependent.

9. A successful training program must not be terminal.

Section II: Description of the Program

The training program proposed is a trainee/trainer self-designed program. Its dimensions will differ with differing groups of trainees. The design seeks to emulate the function of an organizational development consultant when functioning in that proper consulting role. It begins with an assessment, flows through to the development of behavioral and skill objectives, to the development of a design to meet those objectives, to the active involvement in the self-directed training design, and, finally, to the measurement and evaluation placed upon the priorities established.

The training package, then, will be different each time applied, dependent upon the style and priorities of trainees and trainers. A wide variety of materials, many not dissimilar from the PETC materials, would be developed as resources to the trainee and trainer groups. As the trainees proceeded through the program, they would gain greater awareness of the materials developed and the potential of those materials

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in functional contacts. Materials in individual learnings would be applied in practicum situations and evaluated. Trainee performance in these situations would be carefully evaluated and supervised by trainers and other trainers.

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

Title   <u>Organizational Development Consultant Training Package*</u>

Author   _____

Publisher _____

Why did you choose this system?

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*NOTE: This comparison was written on a hypothetical product. A more complete discussion of this description is given on pages 154-156.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST	Efficient trainer/ trainee ratio	Too expensive for poor people	Efficient trainer/ trainee ratio. Training materials are of continuing value	May be too expensive for poor people. Reasonable cost for establishment people
WORKSHOP FORMAT (including ease of implementation)	Clear	Sometimes rigid	Highly flexible based on needs assessment	Requires higher degree of trainer skill and decision making
MATERIAL CONTENT	Constant and able to be supplemented	Perhaps overwhelming	Constant and able to be supplemented	
PROBABLE SHORT-TERM EFFECTS	Increased OD skills	Graduates may not be functioning as OD consultants	Increased OD, personal and perhaps political skill	Unavailability of some resources due to immediacy of need
PROBABLE LONG-TERM EFFECTS	Provides rich material for long-range and varied use	Does minimal affective growth	Includes ongoing self-activating design	
USEFULNESS TO CLIENTS	Broad overview and comprehensive system	Not based on self-defined needs assessment	Meets self-defined needs	May omit some important material

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC	OTHER SYSTEM

Cost (PETC)

☐　　☐　　☒

Reasonable　Somewhat　Prohibitively
　　　　　Reasonable　Expensive

Cost (OTHER SYSTEM)

☐　　☒　　☐

Reasonable　Somewhat　Prohibitively
　　　　　Reasonable　Expensive

Workshop Format (PETC)

☒　　☐　　☐

Well-organized　Parts　Poorly
　　　　　were　Organized
　　　　　Organized

Workshop Format (OTHER SYSTEM)

☐　　☐　　☒

Well-organized　Parts　Poorly
　　　　　were　Organized
　　　　　Organized

Material Content (PETC)

☒　　☐　　☐

Comprehensive　Adequate　Superficial

Material Content (OTHER SYSTEM)

☒　　☐　　☐

Comprehensive　Adequate　Superficial

Usefulness to Clients (PETC)

☒　　☐　　☐

Useful　Somewhat　Not Useful
　　　　Useful

Usefulness to Clients (OTHER SYSTEM)

☒　　☐　　☐

Useful　Somewhat　Not Useful
　　　　Useful

Which would you recommend your client system select?

_____ PETC

___X___ Other System

Review of the PETC Program

Bonard S. Wilson, Ed.D.
Leadership Institute of Spokane
Oct. 23, 1975

1. My opinion of the merit of the rationale and goals of the PETC series:

   a. Clarity: It seems to me the goals of the programs lack clarity,
   or perhaps, specificity would be a better term. They are couched
   primarily in instructional terms rather than in behavioral terms.
   Consequently, they are less effective in giving direction to the
   training and in serving as guides for evaluations.

   b. Logic: I see the logic behind the objectives as being sound.
   The concern I have is that the whole series is in a very logical
   order—each step following the other in a well considered logical
   sequence to the point that it cannot be altered to fit a psychological
   order that may be quite different from the logical order.

   c. Social significance: The goals are socially significant, in my
   view, as far as they go. They do not directly address themselves to
   some of the social issues of our times, in particular the ones of
   social justice, sexism, racism, ageism, etc.

   d. Claims and Disclaimers: Most of the claims and disclaimers have been
   made explicit, as I read them. However, it seems from the evaluations
   that a lot of participants have difficulty understanding these, so
   perhaps these need to be made more explicit, somehow. We were given
   verbally some disclaimers that were not included in the program and
   I would suggest that these be included somewhere.

   e. Recommendations: Objectives and goals should be stated in behavioral
   terms and the same objectives be used for guides in the training
   and for evaluating. It seems now that goals of the program are stated
   in instructional terms and the goals used for evaluation are stated

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c. (continued) in instructional terms and the goals used for evaluation are stated in behavioral terms. I see confusion resulting from this.

2. Target Populations: The target populations have been clearly identified in each of the programs. I would like to see the targets include students, minorities among the targets now identified, and to include all personnel of the school system—janitors, bus drivers, parents, etc.

3. Merit of the content of the instructional system:

a. Conceptual adequacy: The concepts are adequate as far as they go. I especially like the experiential approach and the idea that this is only the starting point. It seems, however, that the concepts come primarily from white males and are in accord with the concepts generally accepted by the school establishment. Also, the concepts support a medical-model approach to consulting rather than the one I see as being more appropriate in which the client is allowed to remain responsible for his own behavior and is given help by the consultant to assess his needs, to plan corrective actions and to devise ways to evaluate his/her own progress. The concepts underlying the role of the trainer are of the medical-model, also. If a trainee discovers that he/she has needs not covered by the content of the workshop, it is seen to be best that he/she drop out of the workshop, rather than alter the "treatment" that is prescribed by the program and the trainer. I would like to see a program based upon the non-directive approach.

b. Theoretical significance: The theories upon which these programs are based is significant theory in the behavioral sciences. The force-field analysis, the use of consultants, the use of internal consultants, and the training of consultants, for instance, are supported

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b. (continued) by valid and significant theories. It seems to me that the significance of the theories and the solid underpinning provided by these theories is a very strong part of the series. I would like to see more content that is based upon other theories of change and change agentry, however, especially non-medical model approaches.

c. Practical significance: The content is well designed to prepare consultants to perform the tasks they are being taught to use with the exception of content in the affective areas. The question of values of the trainees, their concept of persons, their concept of schools, how they feel about themselves and about each other in the training is left pretty much up to being dealt with indirectly. Unless the person had this content before he entered the series or went elsewhere to get it, he would be inadequately trained for implementing the rest of what he learned. The skills learned in the series are probably inadequate for consulting in a situation where social injustice was at the core of the problems. The content, naturally, does not cover other approaches that might be more appropriate in some situations.

d. Empirical justification: There is plenty of empirical evidence that the content is justified for training people to do the consulting that it is hoped they will do when they finish the series.

e. Clarity of definition and presentation: I am impressed with the clarity of the material and of its presentation. It should be understandable to almost anyone and if not, it could be easily explained by the trainer.

f. Appropriate emphasis of content elements: For the consulting approaches being taught in the series, it seems to me the emphasis on the content elements is very appropriate. It also appears that the trainer has freedom to alter the emphasis at any time he sees a need to do so.

g. Adequate integration of content elements: The content elements appear to be adequately integrated.

h. Parsimony: Having only skimmed the content and without the experience of being a participant or a trainer, I see little that could be left out. There surely is some though, since there are hundreds of pages.

i. Sufficiency: For the approach to consulting that is being taught, it seems that there is sufficient content. I am especially impressed with the quantity and quality of it. I would like to see more content on other approaches to consulting, at least if only to call attention to the fact that there are other approaches and other resources available.

j. Recommendations:

1) Content be added that would deal with helping clients learn how to use consultants. The consultant does this indirectly when she/he works with the client, but I think learning how to use a consultant is something that should be taught directly to clients.

2) Add content in the affective or gut level areas of learning for the consultant-trainee, and also content that will help her/him help clients deal with these areas. A consultant could graduate from this program and be unable to help clients deal with values, and feelings. She/he would have to have it before she/he started consulting or get it elsewhere on the way.

3) Add content that would fit populations who are directly concerned with the school system but are not now targets of this program.

4. Appropriateness of training procedures for the system's purposes, content and intended population: For the cognitive and skill aspects of the training, the procedures are very adequate for the intended population. The training procedures for the affective areas, in contrast, are very inadequate. A

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4. (continued) conscious decision was apparently made in developing
the program that the affective aspects would be altered to reach the
other target populations that I have previously suggested should be
included.

   a. Recommendations: Include some direct and planned for T-Group
type experiences in all of the components of the series. This can
be done by trainers who are trained to do it or by programmed and
leaderless methods now available.

   Ensure that the trainers are practicing what they are preaching.
I can see the PETC trainers, just like the rest of us, telling
students to do one thing while they do another. I believe
trainees train others as they themselves were trained.

5. Clarity and appropriateness of the role of the trainer in this program:

   a. The role of the trainer seems to be clear and appropriate, with the
exceptions that I have already noted. The instructions for the
trainer are clear, concise, adequate and appropriate. In
addition he is allowed freedom to follow his own style. There
may be too much freedom for the trainer in the case of a trainer whose
values are not in line with the values underlying the program.

6. Side effects:

   a. Graduates I have seen tend to have a missionary zeal which may put
off some people, but such conversions may have some desirable attri-
butes for the trainers.

   b. Trainees may help a bad school system maintain itself or to resist
changes that are needed. It depends much upon the motivation of the
trainee and if insufficient attention is paid to the motivation of
the consultant in training.

c. Trainees, even though trained for working in educational systems, should be able to consult with most any other group that had people problems.

d. This program has been designed as only a jumping-off point so many of its graduates will go far beyond the training they receive.

e. These programs could be adapted for training other kinds of consultants.

f. The programs could be taught for academic credit in colleges.

7. Additional strengths and weaknesses:

a. Evaluation: Inadequate evaluation has been done and adequate means for evaluating the series have not been developed. The developers and evaluators of the program have not succeeded where the rest of us have failed, is all that I am saying. It would be very helpful to have behavioral objectives that could be used by trainees and trainers in the training and by the evaluators to assess results.

b. Ivory Towerism: I wish the developers had been able to spend more time directly consulting with school systems while developing the program. Otherwise, I fear that the programs may be seen as too academic and/or labeled as ivory tower approaches.

c. I would like to see more flexibility in the design and in the trainers so they would be able to adapt more to individual needs of trainees. I believe trainees can best learn how to adapt to individual needs of clients by having it done to her/him in training.

d. The program seems to work and the participants are very pleased with what they have learned. Some graduates have spent a lot of time and money going through the program.

e. To my knowledge, it is the only program of its kind. It is a
badly needed resource in the field of education. I hope that it
is made available to all systems that can profit from its use.

f. My guess is that it is one of the least expensive ways for a
school system to acquire the consultant expertise that it needs.

g. Most of the exercises, especially in the early part of the
series are old friends and have been well tested.

h. People who enroll in PETC workshops are probably people who
want to bring about changes in themselves and in the school
systems so the program does not have to be concerned with
motivating the trainees to learn and change.

i. The real strength of the program in my view, is the kind of
people the developers are. Good training programs are not
possible without good people as developers and trainers.

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

Title   "Not yet developed"

Author   Bonard S. Wilson

Publisher

Why did you choose this system?

It will hopefully more nearly fit me, my philosophy and way of working.

PETC would be brought in later by them, should we get that for and should they see it as a way of meeting their needs.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC STRENGTHS	PETC WEAKNESSES	OTHER SYSTEM STRENGTHS	OTHER SYSTEM WEAKNESSES
COST	Low		Worth the difference	Will probably cost more
WORKSHOP FORMAT (including ease of implementation)	Very structured for those who like that	Too structured for a beginning intervention	Unstructured and non-directed	Will cause anxiety on trainees and trainers
MATERIAL CONTENT	Plenty of materials	Affective content is insufficient for getting at a lot of current problems	Fewer materials help them to put into practice what they already know	Trainees may want more materials so they can feel they are "learning"
PROBABLE SHORT-TERM EFFECTS	Each segment has some effects		Will get them started! Immediately on being responsible for their own problems	May be hard for them to identify the short-term effects. I may get fired
PROBABLE LONG-TERM EFFECTS	Built in capacity to continue	May cause them to become dependent	They will rapidly become responsible for their own system and behavior	I'll work myself out of a job
USEFULNESS TO CLIENTS	Very useful for what it sets out to do		Very useful. They'll really be able to have in-house capability to run their own show	

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3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC	OTHER SYSTEM

COST

[X]	[ ]	[ ]
Reasonable	Somewhat Reasonable	Prohibitively Expensive

COST

[X]	[ ]	[ ]
Reasonable	Somewhat Reasonable	Prohibitively Expensive

WORKSHOP FORMAT

[X]	[ ]	[ ]
Well-organized	Parts were Organized	Poorly Organized

WORKSHOP FORMAT

[X]	[ ]	[ ]
Well-organized by the trainees	Parts were Organized	Poorly Organized

MATERIAL CONTENT

[ ]	[X]	[ ]
Comprehensive	Adequate	Superficial

MATERIAL CONTENT

[X]	[ ]	[ ]
Comprehensive	Adequate	Superficial

USEFULNESS TO CLIENTS

[X]	[ ]	[ ]
Useful for certain people	Somewhat Useful	Not Useful

USEFULNESS TO CLIENTS

[X]	[ ]	[ ]
Useful	Somewhat Useful	Not Useful

Which would you recommend your client system select?

_____ PETC first and then

_____ Other System

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Appendix F:

ALTERNATIVE SEARCH DOCUMENTS

Letter to Search Correspondents
Description of FETC Series for
   Correspondents
Information Request Form
Characteristics of the FETC
   Series
Abstracts of the Alternative
   Training Programs

November 19, 1975

Dear

The Improving Teaching Competencies Program, directed by Chic Jung at
the Northwest Regional Educational Laboratory, is developing a series
of training materials to enhance the learning environment in schools
and in the classroom. One of the products being developed is *Preparing
Educational Training Consultants (PETC)*, a three-part training program
in process consultation and organizational development skills. Enclosed
is a capsule description of the components of the PETC series for your
information.

As a part of the evaluation of the PETC series, we are conducting a
search for products that are alternatives to PETC. Preliminary steps
in the search have identified you and your organization as having done
work in the area of process consultation and organized change. We would
like information about any products and training systems you have
developed or are in the process of developing in these skill areas, and
any workshops or training programs you present which are not available
in a packaged form.

It is our intention to send copies of the completed study to persons
and organizations who have contributed to its contents. We are not
aware of any existing detailed, descriptive catalogue of process
consultation training packages and programs, and we feel that this
study can be a valuable resource for people working in this field. We
are asking you, then, to be as complete as possible in the information
you provide us. Specifically, we are requesting information on costs
to participants, time involved, participant prerequisites, theoretical
background, strategies used, expected outcomes, and results from any
evaluation studies which have been done on the training system. We
have enclosed a form and prepaid envelope for your convenience.
Whatever information you can provide us will be appreciated.

Regards,

David A. Green
Research Assistant
Improving Teaching Competencies Program
Northwest Regional Educational Laboratory

Enclosures: 2

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PETC-I: Skills Trainer Workshop is for diagnosis of _individual_ _and group needs of educators in the area of process skills such as goal_ _setting, communicating, influencing or decision-making._ The PETC Skills Trainer has competencies in selecting, adaptively designing, conducting and assessing results of skills training exercises for such needs. His training prepares him to conduct _Group Process Skills (GPS)_ workshops. It does not prepare him to offer other kinds of consultation or training services to a client system.

PETC-II: Consulting is for applying differential diagnostic techniques and differential intervention strategies in _helping a client_ _system move through phases of an improvement effort._ The PETC-II Consultant forms a temporary relationship with the client system to add, or strengthen, a function needed to realize a value or attain a goal. The PETC Consultant is also involved in continuously rediagnosing his own competencies and deriving his explicit rationale for assuming the consultant role.

PETC-III: Organizational Development trains the consultant to apply further diagnostic and intervention techniques. Their goal is to facilitate normative and/or structural changes which _add and maintain_ _improved functional capability of the organization._ Whereas the PETC-II Consultant temporarily supports needed functions, the PETC-III Organizational Developer helps to build them into the system permanently when appropriate and feasible. In addition, PETC-III consultants apply techniques which increase those functional capacities of the organization to add new kinds of objectives and utilize new kinds of resources.

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Name of training package or program:

How is it made available to the public?

Number of participants (minimum-maximum):

Participant prerequisites:

Cost of the workshop for participants:

Time investment involved:

What is the theoretical basis for the workshop's content and strategies?

Describe the workshop strategies:

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What are the expected outcomes (claims, disclaimers)?

If an evaluation study has been made on the training package, would you please send a summary of the results.

If there is a brochure for the training system, would you please enclose a copy.

For further information, whom should we contact?

Thank you.

David Green
Research Assistant
Improving Teaching Competencies Program
Northwest Regional Educational Laboratory

Characteristics of the FITT Series

I. **Target Population**

A. Practicing educators whose roles allow time for training and consulting—especially local school district, central office staff, administrators, counselors, group leaders, higher education faculty and state department of public education staff, or those who have reasonable aspirations to such a role.

B. Primarily education personnel—public, private, religious—all levels.

C. Groups of 12 to 18 participants.

D. Prerequisites include NWREL instructional systems: *Interpersonal Communications, Research Utilizing Problem Solving, Interpersonal Influence, Social Conflict and Negotiative Problem Solving,* or their equivalent, plus a training experience in system technology such as the Corrigan's version, *Systems Approach for Education.*

II. **Content Provided in Training**

A. <u>Conceptual and theoretical material</u> in the following areas: Diagnosis, selection, sequencing, adaptive redesigning and conducting of skills training exercises in such process areas as goals clarification, communications, decision making and conflict; planned change in group process consultation including phases, differential diagnosis, differential intervention and self-analysis and values consideration; individual and organizational development and evolution; organizational growth and maturity; educational purpose and functioning of educational organizations; interventions and strategies for working at organizational development and continued growth as a consultant.

B. <u>Skills and techniques</u> of diagnosing, selection, redesigning and conducting skill training exercises. Techniques for differential diagnosis and intervention in group consulting. Techniques for conceptualizing, diagnosing and intervening in organizational development. Skills and techniques for supporting growth of clients, colleagues and self in process consultation and organizational development.

C. <u>Personal insight</u> and derivation of meanings as planned part of professional growth.

D. When comparing with other training systems, <u>content of prerequisites</u> need to be considered.

III. Procedures and Strategies

A. Workshops include: small group skills training exercises; didactic reading and presentations; individual study, analysis and planning; pair, trio, intergroup and small group consultations and presentations with feedback; practice in diagnosis and intervention in individual and group process; exploration of professional values and philosophy; and, evaluation and self-analysis.

B. Practica and projects include direct work with client groups including evaluation feedback, critique by colleagues and supervision by senior trainers.

C. Emphasis is on peer learning groups developing norms and strategies for self-direction and supportive peer critiquing and interdependence. Senior trainer role is more to support the learning process than to provide content expertise. Content is provided in the PETC materials and other resource materials which are identified and retrieved as relevant.

IV. Expected Outcomes of Program

A. Familiarity with the main conceptual content of the three PETC instructional systems and demonstrable ability to use these materials and designs in training and consulting.

B. Clarification of motivation to work in this field with self-selection in or out during the sequence of training.

C. Individual identification of current strengths and weaknesses in process training and consulting.

D. For those whose professional roles reasonably support it, increased training and consulting activity.

E. Positive response from over 90 percent of trainees who enter these systems voluntarily with appropriate expectations.

F. Clearer conceptual and philosophical orientation in process training and consulting.

G. Some increase in clarity and skills in using interpersonal and problem solving techniques ala the prerequisites and techniques of skills training, diagnosis, intervention and organizational development strategy. Specific gains of this sort will be peculiar to individuals dependent on their past experience and experience called for as relevant to their practicum clients.

H. For those who continue in process training and consulting, collegial norms of continued collaboration in work and growth as a consultant and for continued self-initiative of professional growth in this field.

V. Trainers

Persons experienced in both structured (ala NWREL systems) and
unstructured process training. Experienced in training process
trainers. Experienced, as participant and trainer, with the three
PETC's as well as the other NWREL prerequisite instructional systems
plus alternative ways of providing such training. Skilled in
designing as well as conducting process training. Familiar with
the literature in this field.

VI. Dissemination

A. Initial strategy involved national network of NWREL regional
representatives. Brochures have been used in targeted areas
during development of the systems. Most involvement of
participants has been planned within interested organizations
by administrative personnel or by word of mouth leading to
expression of desire to be involved.

B. The three PETC instructional systems are timed respectively as
follows. PETC-I: five straight 9-hour days training of skills
trainers followed by a 5-straight day practicum workshop.
PETC-II: three 3-day, 9-hour days workshops conducted con-
secutively or with as much as two week interludes. PETC-III:
five 4-day workshops conducted once every four to eight weeks.
The prerequisites, which should be distributed before and
between the PETC systems, involve 4- to 5-day workshops and
1- to 6-day workshops. These can be divided into 2½- to 3-day
sessions with interludes for any particular workshop up to two
weeks. This total sequence of training, then, involves 65 days
of intensive workshop training, plus time involved in the
organizational development project. This has been experienced
as feasible for practicing educators when distributed over a
3-year period.

C. The average cost for a participant going through the 39 days
of the three PETC systems in a nonresidential setting using an
external senior trainer may be estimated as including $75 for
materials and $750 toward costs for the senior trainer. This
would be a fee of $850, which breaks down to about $21 per day
of workshop training per participant.

D. Over 500 persons have completed PETC-I since development work
began on it six years ago. Development work begain on PETC-II
and PETC-III three years ago. Their use has been limited to
evaluation needs of this development. During this three years,
about 170 persons have advanced through PETC-II and about 50
persons have gone all the way through completion of PETC-III.

E. Academic credit from higher education institutions or state
departments of continuing education has frequently been arranged
for the PETC's and their prerequisite systems. In two settings,
advanced degree programs have been offered based on this
combination of training.

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F. Evaluation reports created as part of the NWREL development of the SET's may be purchased on request. These include both formative evaluation reports used to modify and improve the systems during their sequence of developmental revisions and summative reports made at the conclusion of development. The latter would be more relevant to potential users. Evaluation studies involved written questionnaires and interviews from participants during and after their training. Questionnaires and interviews from clients of the participants. Structured and unstructured observations of evaluators. Questionnaires and interviews with the senior trainers. Documentation of work done by participants in work with clients, for themselves and with each other. There were also reviews by outside experts.

Table A

A Comparison of 12 Alternative Instructional Systems in Process Training,
Consultation and Organizational Development

Dimensions	Comparison Information
Instructional System or Program	Preparing Educational Training Consultants: Consulting PETC-II Northwest Regional Educational Laboratory 710 SW Second Avenue Portland, Oregon 97204
Target Population	Practicing educators in roles open to provide training and consultation Several areas and level of education In groups of 12 to 18 Prerequisites of 3 problem solving and 2 interpersonal skills workshops
Content Provided in Training	Use of skills training exercises for process issues Small group diagnosis and intervention for planned change improvements Organizational development theory and practice in education Self insight and professional growth
Workshop Procedures and Strategies	Workshops with range of theory and experiential learning activities Trainer supervision and interteam consultation Practicum with client groups for each team Diagnostic instruments and techniques Extended organizational development project Emphasis on peer learning groups
Expected Outcomes	Familiar with and able to use materials Clear motivation/self-selection Self-diagnosis and values consideration Increased training where role permits Positive toward training Clearer conception and philosophy Some increased practice skills Colleagueal norms among peers
Trainers	Experienced in structured and unstructured process training Experienced in training trainers Experienced with PETC-I, PETC-II, PETC-III and NWREL prerequisite systems as participant and trainer, knows literature
Dissemination	National network, brochures, word of mouth PETC = 39 workshop days plus 26 days of prerequisite workshops Average cost $21 per trainer per day 500 started, 50 completed limited offering of workshops in past 3 years of development Academic credit frequently offered Evaluation Reports available from NWREL

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Dimensions	Comparison Information
Instructional System or Program	Process Approach to Planned Change Dr. Nick Colorell, President Center for Planned Change 2039 N. Geyer Road St. Louis, Missouri 63132
Target Population	Various school personnel Educational Teams of 4 to 6 up to total of 100 Prerequisites are selection by peers and according to personal characteristics
Content Provided in Training	Systems theory Value based planned change strategies Small group theory and planned change skills Management theory Planning skills Communication skills Development of plans and strategies
Workshop Procedures and Strategies	Theory input Team learning tasks Skill practice Team building Behavior contracts Evaluation Long-range planning

Expected Outcomes	Trained internal change agent consulting team
	Change in the organization including:
	    Improved internal climate
	    Organizational direction setting
	    Organizational value clarification
	    Adaptation in response to environment
	    Human resource development

Trainers	One trainer per team "Center staff" or local trainer with "high level of experience" "Masters level education people" can become trainers
Dissemination	No particular strategy 10 days spread variably $50,000 to train 2 year OD program Between 500 and 750 trained Academic credit available Evaluation claimed

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Dimensions	Comparison Information
Instructional System or Program	Advanced Consultation Skills Lab Social Science Education Consortium Boulder, Colorado
Target Population	Various educational roles Education Minimum group of 25 No prerequisites
Content Provided in Training	Skills practice on process issues Consulting issues Theory: Benne, Lewin, Moreno
Workshop Procedures and Strategies	Trainer lead whole group discussions and activities Demonstration and small group practice of skills
Expected Outcomes	Variable according to participants 　　Practiced consulting skills, tools, methods 　　Conceptualized consultation process, strategies 　　Made backhome plans 　　Explored value and causal consequences
Trainers	Ron Lippitt and Eva Schindler-Rainman
Dissemination	Brochures and word of mouth 3 days $135 = $45 per day Between 150 and 200 trained No academic credit No evaluation

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Dimensions	Comparison Information
Instructional System or Program	Introduction to Organization Development Mathew Miles 94 Sparkill Avenue Tappan, New York 10983
Target Population	Any educators Education 8 to 35 participants No prerequisites "other than an interest in OD"
Content Provided in Training	Stages of an OD change effort as outlined in Schmuck and Miles, Organization Development in Schools
Workshop Procedures and Strategies	Theory input Small groups work through case study Role play Whole group discussion of diagnosis and intervention
Expected Outcomes	Cognitive clarity about OD Increased basis for making OD decision
Trainers	Matt Miles David Kellcher
Dissemination	Brochure 2½ days Usually $100 to $150 = $50 per day 100 to 150 trained No credit No evaluation

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Dimensions	Comparison Information
Instructional System or Program	Doctoral Program in Organizational Behavior Department of Organizational Behavior School of Management Case Western Reserve University Cleveland, Ohio
Target Population	Graduate students School of management 10 new students per year No prerequisites specified

Content Provided in Training	Conceptual and theoretical background to OD
	    Personality theory and development process
	    Interpersonal relations and group dynamics
	    Organizational theory
	    Large systems and cultural processes
	Methods and skills of applied behavioral science
	Personal development

Workshop Procedures and Strategies	Seminars Personal development groups Research and development projects Practicum in 2nd or 3rd year Individualized strategies Dissertation in 4th year

Expected Outcomes	"Broad based behavioral scientists" skills in:
	    Teaching and research in OD
	    OD planning and development
	    Consulting
	    Managing change
	    Conflict resolution
	    Laboratory training

Trainers	Faculty of 16 for 40 students
Dissemination	No strategy 3 to 4 years $2,850 for 2 semester years 57 Ph.D. graduates Ph.D. program No evaluation reported

Dimensions	Comparison Information
Instructional System or Program	Organizational Effectiveness Training Ms. Lee Douthit Consultant/Trainers Southwest Administrative Office P.O. Box 947 Emporia, Kansas 66801
Target Population	All levels of management personnel Many field including education 9 to 24 participants One week of "laboratory experience" plus being in organization where learnings can be applied
Content Provided in Training	Strategies for data gathering and analysis Systems analysis Goal setting and planning change Methods for program evaluation Identifying and diagnosing organization ills Conflict coping strategies Organization theory
Workshop Procedures and Strategies	Laboratory method of experiential learning Design evolves according to participant needs and goals Backhome change project between 3 week long workshops
Expected Outcomes	Gather and use data Plan goals and priorities Develop methods of evaluation Problem solving Management of conflict Make a systems analysis Recognize effects of own and others behavior Internal consultant and manage OD Gain in self-confidence
Trainers	Ms. Eleanor Hill and assistants
Dissemination	Mailing and word of mouth 3 one-week workshops over 6 months $800 = $38 per day Between 75 and 125 trained No credit No evaluation

Dimensions	Comparison Information
Instructional System or Program	Advanced Organizational Development Training Lab Consultant/Trainers Southwest Administrative Office P.O. Box 947 Emporia, Kansas 66801
Target Population	All levels of management personnel Many fields including education 9 to 24 participants Previous "OD training experience of at least several days duration"
Content Provided in Training	Data handling Problem solving Decision making Communications Planning and implementing change Creating organizational atmosphere for change Training organizational colleagues for using OD technology
Workshop Procedures and Strategies	Laboratory method of experiential learning Design evolves according to participant needs and goals
Expected Outcomes	Increased skills and insights in: Data handling Problem solving Decision making Communications Planning and implementing change Creating organizational atmosphere for change Training colleagues for using OD technology
Trainers	Trainers who are part of Consultant/Trainers Southwest network 3 trainers experienced in: Organizational consulting Personal growth Organizational development
Dissemination	Mailing list and word of mouth 6 straight days $230 = $38 per day Between 75 and 125 No credit No evaluation

Dimensions	Comparison Information
Instructional System or Program	Organizational Renewal Workshop—Gordon Lippitt, Developer Jacqueline Rimley, Executive Director Organizational Renewal, Inc. 5605 Lamar Road Washington, D.C. 20016
Target Population	Primarily line personnel or staff personnel who train others Various fields 12 to 24 participants No prerequisites
Content Provided in Training	Understanding growth potential of organization Developing communications in organization Developing organizational teamwork· Coping with change Implementing renewal in an organization
Workshop Procedures and Strategies	Film ror theory input Written "instrument" to guide learning Group discussion

Expected Outcomes	Participants will have:
	    Diagnostic tools for analyzing organizations
	    Practice in process skills
	    Theory in organizational growth and communications
	    A change project to initiate in their organization

Trainers	Network of 165 certified trainers
	Can train an "in-house" trainer
	Training trainer involves going through workshop plus
	  1 day briefing
	Certify only people who have basic trainer and group
	  leader skills already

Dissemination	3 regional vice presidents and network of trainers, direct mailing 5 modules, each 3½ hours Cost of $150 to $250 = $60 per day No evaluation indicated

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Dimension	Comparison Information
Instructional System or Program	Team Building and Process Consultation Rick Reichard, Director—Professional Development Division NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	People active in applied behavioral science Various fields Minimum of 30 participants Must have completed an NTL "Advance Professional Development Learning Community Core Program"
Content Provided in Training	Process consultation using Ed Schein's book
Workshop Procedures and Strategies	Team building Case study Interteam consultation Theory building from experience
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 5 days straight $350 = $70 per day No credit indicated Participant questionnaires used for self-ratings of program

Dimension	Comparison Information
Instructional System or Program	Program for Specialists in Organization Development John Adams, Director—Professional Development Division NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	Mainly internal OD practitioners plus a few external and teachers of OD Various fields Maximum of 40 participants Must have a "basic lab" and NTL consultation or training theory and practice lab plus OD experience
Content Provided in Training	Professional and personal self-assessment OD theory, techniques, directions, ethics Dynamics of large and complex systems
Workshop Procedures and Strategies	Experiential learning Didactic cognitive inputs
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 2 weeks straight $700 = $70 per day No credit indicated Participant questionnaires used for self-ratings of program

Dimensions	Comparison Information
Instructional System or Program	Observation and Intervention in Work Groups Rick Reichard, Director—Center for Professional Development NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	Anyone concerned with making work groups more effective Any field 12 to 24 participants Must have an NTL "Advanced Professional Development Training Community Core Program"
Content Provided in Training	Theories of intervention Conceptual maps for observing groups Group intervention
Workshop Procedures and Strategies	"Personal case papers" for theory building Observation of audio-taped groups Video-taped intervention simulations
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 5 days $350 = $70 per day 45 trained No credit indicated Participant questionnaires used for self-ratings of program

Dimensions	Comparison Information
Instructional System or Program	Consultation Skills Seminar Scientific Methods, Inc. P.O. Box 195 Austin, Texas 78767
Target Population	Consultants, trainers, OD specialists Business and industry 8 to 32 participants Prerequisites "defined by the roles of the target population"
Content Provided in Training	"Consulcube" by Blake and Moulton Five intervention strategies Five units of change Four focal issues
Workshop Procedures and Strategies	Experiential learning Skill practice Case studies Pairing and small groups

Expected Outcomes	Participants will be:
	    Experienced with "consulcube"
	    Able to evaluate strengths and weaknesses of
	      OD interventions
	    Will have systematic approach to determining change
	      interventions

Trainers	Only scientific methods personnel: currently 4 trainers in U.S. and 3 outside the U.S.
Dissemination	Mailing list and word of mouth 5 days $750 = $150 per day No credit Participants write critique of program

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Dimensions	Comparison Information
Instructional System or Program	Internal Consulting Skills Workshop Gordon Lippitt, Developer Jacqueline Bumley, Executive Director Organizational Renewal, Inc. 5605 Lamar Road Washington, D.C. 20016
Target Population	Primarily, staff roles that influence program changes from nonauthority position Various fields 12 to 24 participants Prerequisite to be in position to use training in their work, prefer training experience
Content Provided in Training	Consulting/helping process 4 phases of consulting Skill practice on entry Tools of data gathering, model building and training methods Skill practice on entry Evaluation of consulting and personal growth
Workshop Procedures and Strategies	Diagnostic instruments Skill practice Case Studies Exercises Group discussion Application groups Presentations
Expected Outcomes	To have studied process of internal consulting To have studied how consulting steps are handled depending on relationship to system To have provided opportunities to design strategies or models to implement problem solving and development needs of organization
Trainers	Network of 165 certified trainers Can train "in-house" trainer Training trainer involves going through workshop plus 1 day briefing Certify only people who have basic trainer and group leader skills already
Dissemination	3 regional vice-presidents and network of trainers, direct mailing 3 days $150 to $250 = $50 per day In last four years, 750 trained plus 20 certified as trainers Academic credit sometimes arranged Self-evaluation at end of materials