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The University of North Carolina at Greensboro ED.D. 1985

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by
Salvatore J. Sinatra

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Approved by

Lois V. Edinger
Dissertation Adviser

APPROVAL PAGE

This dissertation has been approved by the following committee of the Faculty of the Graduate School at the University of North Carolina at Greensboro.

Dissertation Adviser

Committee Members

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SINATRA, SALVATORE J., Ed. D. **A Case Study of the Management Development Program in One Medium-to-Large U.S. Corporation, Using Tyler's Framework. (1985) Directed by Dr. Lois V. Edinger. pp. 173.**

The purpose of this study was to examine the extent to which the training and development program in one medium-to-large American company had been developed using the framework prescribed by Ralph Tyler (1949). The focus was on the approach used by that company to add, delete, change, and structure individual courses for the total program.

The study was based on findings in the literature that 1) management training and development (MD) programs are necessary but costly, yet are often being developed through random or other non-systematic means; 2) company executives prefer a systematic approach to other means; 3) Tyler's framework, an example of the systematic approach, is the method most suitable and preferred.

The research procedure used was a case study. Formal interviews were conducted, using a structured interviewing outline developed for this study, with the firm's curriculum developer, two subject matter experts, two participants, and a staff manager. Data were also obtained from the researcher's observation of and participation in a company-sponsored training session, from his review of training documents on file in the company's training organization, and from informal conversations with employees.

Answers to four research questions were obtained: 1) a systematic approach to MD development is strongly endorsed; 2) Tyler's framework is the prime example of the systematic approach; 3) the extent to which

the framework has been applied in the company's MD program is negligible (much like the findings in the literature); 4) the company is advised to revisit its MD program using Tyler's framework.

The study suggests that further inquiry relating the dollar implications of such adherence is warranted. Research to determine conditions under which Tyler's method might not be suitable is also advised.

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My gratitude to those who cared
With expert hints on how this fared.
To Lois, Ethel, Dale and Bill -
Their pointed prompts, their single will.

And to that one guy sorely missed
Whose heartfelt nods, "Let's finish this!"
Gained equal nods but faint complies
Until such time as Doc Clark dies.

Doc's gentle spurs were sharp, were fine,
'Though never once strayed out of line.
The sage appeals were one-on-one,
But not full-grasped 'till all was done.

A needed cast was all at play:
Christine and Carol, Cathy, Kay,
I thank them each as true I can
And share the pride of this proud man.

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CHAPTER I.

INTRODUCTION

Problem and Purpose of This Study

Management training and development programs are a fact of business life. Random rather than systematic approaches to their design and development are in frequent use, despite lip service by many American companies given to a systematic approach.

The purpose of the study was to examine the extent to which the training and development program in one medium-to-large American company had been developed using the framework prescribed by Ralph Tyler (1949). Tyler's framework is an example of the systematic approach. The focus was on the approach used by that company to add, delete, change, and structure individual courses for the total program.

The study was based on findings in the literature that 1) management training and development programs are necessary but costly, yet are often being developed through random or other non-systematic means; 2) company executives and curriculum experts prefer a systematic approach to other means; 3) Tyler's framework, an example of the approach, is the method most suitable and preferred.

Methodology

The method used was the case study. This determined through several techniques the extent to which the management training program in the selected company matched Tyler's prescriptions.

The techniques were formal and informal discussions, a training document review, the researcher's personal observation of and participation in training, and an analysis of the results.

Each of Tyler's four key questions was examined in depth to assist the researcher in relating the firm's practice of development to Tyler's sequence. Structured and unstructured discussions were conducted with key employees: one Curriculum Developer, who is also the Program Administrator and Training Manager; two Subject - Matter Specialists, who rendered input on program content; two participants in the training program; and a Staff Manager. The documents reviewed included sample training manuals, leaders' guides, course outlines, and related letters and memoranda. In an effort to obtain candid responses from the interviews, anonymity of subjects was assured; to secure relevant and valid data from the document review, proprietary information was safeguarded. After an analysis of results, comments and recommendations were made.

The case format, a nonexperimental technique, was selected for this study for several reasons, including the expert opinion that its special value "lies in its effort to discover all the variables relevant to a given case [and appropriately] tries to convey an understanding of a class or type of phenomena by the full description and detailed analysis of one or a series of cases belonging to that class" (Chinoy, 1964, p 74-75). The "class" in this study is management training in American industry. Other techniques had been considered, such as survey feedback involving a random selection of many American firms sponsoring management training, but were judged inappropriate.

Questions to Be Answered

The study was designed to answer the following questions:

1) **Is a systematic approach for management training development prescribed over random and other possible approaches?**

2) **Which, if any, framework is a prime example of the approach?**

3) **To what extent has that framework been applied in the management training program of the company examined in this study?**

4) **What recommendations can be made in light of this study?**

Need For This Study

Serious inquiry into the issue of systematic curriculum development has not been advocated until recently (Maxfield, 1979), although there appears to be a problem of diversity (randomness, accretion, faddism) that has warranted investigation.

An indication of how widespread this problem is in American business is the degree of interest shown in management development. In terms of money, for example, United States companies spend at least one billion dollars a year on training and development (Craig, 1976; French et al. 1978; Lundberg et al., 1973). One firm alone has reported an annual expense of over $75 million, and this represented only the salaries of the participants, not dollars for training activities and facilities (Holt, 1963). The author's own company is said to budget more for training and development annually then the sum budgeted by several major learning institutions. Indeed, American firms appear to "spend more than all of public education -- kindergarten through graduate school combined" (Fraser et al., 1978, p. 682).

Besides dollars, interest in management training is shown by the number of training programs and by the number of employees participating. At least 90% of private American firms sponsor training, primarily management training (Bureau of National Affairs, July 1955; National Industrial Conference Board, 1964), 40% of these programs being targeted for middle management (BNA, 1963). Current membership in the prestigious American Society for Training and Development (ASTD) is a striking 22,995, according to the Society.

Despite such interest, executives are not quite sure how best to formulate good training programs. They are, at the same time, struggling to manage difficult change and acquire spiraling knowledge in what has come to be known as the the age of information (Daly, 1976; Hagedorn, 1984). Indeed, employers could once have relied on the college curriculum to provide most of the knowledge and skills needed to enter the business world; nowadays, however, college graduates appear ill-equipped to perform some of the basic functions in management, such as effective writing, presentations, supervision, and evaluation (Bell, 1984; Carnegie Foundation, 1977; Sanford, 1984).

Employers are striving to compensate for this deficiency through management training programs. Many are turning to in-house and outside courses and apparently will have to for some time to come, according to some sources ("Behavioral Sciences Newsletter," March 1982; French; Goldstein, 1974; Gorman, 1976). Whatever uncertainties executives might exhibit concerning management training and development (MD), providing basic skills to apprentice managers is not among them.

We thus find the need for training is not in dispute. Yet how well is the development of training programs being accomplished? Training development is evidently being done with some spurious collection of program objectives, of content, and of techniques. Programs are often vague and imprecise in one or more of these respects. One study (Burke and Schmidt, 1971) reported objectives as variously "new skills," conceptual understanding," "something wrong," "do not know company policy or philosophy," and "needed skills." Although this condition can be explained by differing needs, it is also explained by accretion, modification, multiplication, and deletion rather than curriculum development (Tanner and Tanner, 1980). It can be explained by the tendency of faddists to seek out methods or studies having current and intuitive appeal (Campbell, 1971; French, 1978) or by the failure of developers to formulate and communicate the program's objectives throughout the company. And pride in authorship for "home-grown" methods or its converse, the "NIH" (not invented here) syndrome, seems also to be contributing to program "development." Whatever the explanation, randomness, diversity, and disorder are prompting many executives to become less inclined to sustain expensive Management Development (MD) programs based solely on faith or preference and even less willing to support programs lacking in continuity, in focus, or in company relevance (Bureau of National Affairs, Sept. 1967; Burke and Schmidt; Daly, 1976; Goldstein, 1984; Odiorne, 1961).

In terms of how training and management programs are being developed, randomness again is in evidence. In 1952, the first time "methods" were reported (Mahler and Monroe), an unstructured collection was in use. The most prevelent method at the time was a request from top management; others were observation, conversations with supervisors, group discussions and conferences, analyses of reports, recommendations from advisory committees, questionnaires, and merit or performance rating. More currently, about sixteen methods have been identified, according to French. And each is complicated, to one extent or other, by an inadequate analysis of what training is needed, by the lack of involvement by top management, or by the questionable congruence between an MD program and the company's business environment (Campbell and Dunnette, 1968; Hayes, 1979; Zaleznik, 1951).

Confusion or inconsistency surrounds MD programs in discussions on the topic. "Curriculum," for example, means different things to different people (Huebner, 1976). Curriculum may refer to a smorgesbord of in-company activities, out-of-hours courses, seminars, conferences or core of activities, or to "a [structured] technological system of production, [with] controlling modes, activity analyses, behavioral objectives, and systems analyses" (Tanner and Tanner, p 37). "Management development" may or may not be synonymous with "human resources development," with "training and education," with "training and development," or with "training." Frankly, the only real common ground found among practitioners is that "large sums of money [are being spent] for this activity," whatever it is and however it is being handled (Nadler, 1982, p 1).

Structure of The Study

In this chapter the researcher has recognized the training problem being faced by American business and has outlined the purpose and procedure used in studying the extent to which one firm has applied a recommended approach to develop its management training program. Chapter II contains a review of the literature related to this study. In Chapter III the methodology applied in the study is explained. Chapter IV presents a case study of one medium-to-large American firm sponsoring management training and development. In Chapter V an analysis of the results is performed, and conclusions and recommendations are made from the analysis of results.

Terms Used

As used in the study, terms are defined as follow:

- Framework -

A structural design, plan, paradigm, model, or exemplar that, when systematically applied, can help standardize an activity or procedure. It refers also to a symbolic representation of an orderly process.

- Management Development (MD) -

The cultivation of knowledge, skills, and/or attitudes for current or aspiring management employees. Its activities include but are not limited to "courses in human relations, decision making, and the executive's role" and such job events as "training, counseling, job rotation, coaching, sabbatical leaves, and career planning" (Burke and Schmidt, p 44). It is here synonymous with "management education," "supervisory training," "training and development," or similar terms.

- Program (or Curriculum) -

All the guided experiences the learner undergoes under the sponsorship of a single agency such as a university or business firm. It involves the collection of in-company and outside training activities such as courses, seminars, and workshops; of work events such as job rotation, enlargement, and enrichment; and of guidance.

- Program (or Curriculum) Development -

The activity or process that seeks to provide a curricular vehicle that enhances individual knowledge, skills, and attitudes for a desired end, usually improved individual and organizational performance.

- Program (or Curriculum) Developer -

The professional officially charged with program development; the person who "seeks to create conditions that will improve learning" (Gress and Purple, 1978, p 15). This person is a member of the management team and is variously referred to as "trainer," "training specialist," "developer," "human resources specialist," or similar term. In this case study it is the same person as the Program Administrator and Training Manager.

- Systematic -

Referring to the orderly use of knowledge and relationships in such a way as to be effective. The term refers to a sequential, causal, or otherwise logical process that opposes program development by accretion, faddism or randomness. A systematic approach here means the application of a framework.

CHAPTER II.

REVIEW OF THE LITERATURE

This chapter surveys the fields of Education, Business Administration, and Psychology to identify prescribed approaches for developing instructional programs, in particular, management training and development programs.

The purpose of this review is to determine whether the literature favors one approach over another, one framework over another. Given that finding, the review provides a basis for conducting a case study to assess the extent to which one medium-to-large American firm has applied the prescribed approach.

Included in this review are a discussion of systematic vs. random development as defined in Chapter I, the framework for development prescribed by Ralph Tyler (1949), the management development frameworks most often endorsed in the business literature, support for and criticism of the favored frameworks, and other approaches that are prescribed or practiced.

The review indicated that similar curricular elements pertain to the fields of education and business (Hayes, 1979), and that one prescription, the systematic approach of Tyler, is appropriate for both curricula. In the education literature the name of Ralph Tyler is known and his framework is widely referred to; in the business literature the name of Tyler is not referred to, although comparable schemes have in fact been described.

The review also revealed discrepancies with Tyler's framework, as will be noted shortly. Although it has certainly influenced curriculum development from the early part of this century, the framework has been challenged because it is said to be inadequate in its focus on the human element of education. It is perceived to be sterile and inflexible, to discourage pertinent values and traditions in the making of curricula. Macdonald (1965, 1973, 1974, 1980) and Huebner (1968, 1976, 1980), for example, have argued that moral and aesthetic dimensions of education must be included. The Tyler framework, which will be seen as a four-question rationale that addresses purposes, activities, organization, and evaluation, is silent on matters of value and tradition.

Supporters of the framework are far greater in number. In the prevailing view, Tyler's work is considered a good example of a controlled, ends-means approach that zeroes in on just what should be learned, a tool that employs relevant information from key sources of input (learner, society, subject specialist), and one that solves a specific educational problem in a specific educational setting.

Supporters point to its important historical roots. In 1918, for example, Franklin Bobbitt's influential work, The Curriculum, was published. In that work, Bobbitt provided a genesis for the systematic approach to studying the learner as a way of determining appropriate learning activities. Bobbitt used the "scientific method," a concept that paralleled the business approach of the day known as scientific management (Taylor, 1911). Just as advocates of scientific management had been urging business supervisors to study worker abilities and limitations in order to determine individual peak effectiveness and achievements, so advocates of the scientific method were urging curriculum makers to study learner "abilities, attitudes, habits, appreciations, and forms of knowledge" (p. 42) in order to determine specific learning activities. To Bobbitt, curriculum meant a "series of things . . . children and youth must do and experience by way of developing abilities to do the things that make up . . . adult life . . ." (ibid), a collection of activities that must be analyzed and sequenced to reflect adult reality. Diagnosing reality in terms of learning objectives was, therefore, critical to curriculum making.

Elements of Tyler's work are found in the efforts of Giles, McCutchen and Zechiel (1942); in Bloom (1956); in Mager (1975); and in others, who before or since Tyler have studied sources of input as determinants of curricular objectives. Giles et al., in particular, has outlined the "determinants" of Tyler's curriculum as the sources of input for a program developer to consider in curriculum making.

Systematic vs. Random Development

The first chapter of this study suggested that many MD programs have been developed through random, faddish or preferential means and that many in the field want something more systematic.

A review of the literature revealed an important conflict in this regard. The theory of systematic development apparently differs from the practice of MD development. Random, episodic, or evolutionary means are apparently being practiced in three educational settings--

the public, private, and government sectors--although all three claim to support a systematic, rational method (National Academy of Public Administration, circa. 1981).

It is not clear why this conflict occurs, but the method does guide developers to do three things: 1) **isolate** the problem; 2) **identify** options; and 3) **select** relevant activities (Cicero, 1976; Daly, 1976; Goldstein, 1974). It is highly doubtful these are being accomplished as prescribed.

Most authors who were reviewed tend to favor an "open" model for curriculum development. The open model is a working hypothesis that accepts input from external sources and accounts for such factors as human error and difference in learning rate. According to Nadler, the open model fosters certain key activities which parallel and/or operationalize the items above; that is, it 1) identifies possible courses of action and anticipation of outcomes, 2) determines what will happen if the model is followed, and 3) encourages growth in learners and in organizations.

These same authors specified the beginning of curriculum development as the formulation of clear goals and objectives which relate to a diagnosis of the organization's needs. This formulation should be followed by the establishment of a suitable learning environment, that is, one in which the training modes and activities are appropriate for the goals and objectives established. Specific criteria for evaluation are used to terminate the cycle.

The literature has elaborated on these steps. Cicero advised they be "broken down into several [smaller increments] which take the program design from initial establishment of a . . . goal through the development of an ongoing feedback and revision cycle" (p. 12-1). Lawrie (1984) urged developers to "get a good fix on two separate but related questions: 1) 'How will I know when and if [the program] has eliminated or reduced this specific problem?' . . . 2) 'How will we know when our work . . . has succeeded'?" (p 18). Some have insisted developers establish "a client-driven data base that can help estimate the resources needed to develop and deliver training [in order to] approach senior management with a budget request based on solid data rather than a laundry list of training needs" (McKenna, Swenson, Wallace and Wallace, 1984, p. 83).

Throughout the literature, systematic development is preferred over nonsystematic means--ad hoc, evolutionary, episodic, accretive approaches that claim to be responsive to a problem. Systematic problem-solving is required (Blake and Mouton, 1980; McKenna et al.) that at once accounts for <u>content</u> based on diagnosed needs (such as training in planning, administration, and supervision); <u>learning modes and experiences</u>; <u>resources and facilities</u>; and <u>evaluation</u> (Daly, 1976; French, 1974; Niehoff and Romans, 1982).

Specific questions about the training problems should be explored by the developer, such as:

> What purposes and objectives does [the program] prescribe? What overall focus for learning does it have? What is the nature and organization of the learning experiences it includes? What relationships among objectives and learning experiences are contained in [the program]? How does it propose to assess the progress of learning? (Goldstein, 1974, p. 238)

Tyler's Framework

Since the appearance of the work of Bobbitt and others, the literature has been dominated by control and prescriptive dicta (Boyd, 1983), especially comments on the systematic approach. The prime example of this approach is the framework of Ralph Tyler; the method he espoused is virtually synonymous with the systematic approach to curriculum development. The "reflective formulations" of Dewey (1929) and the thinking of other progressive educators have contributed to the shaping of Tyler's method.

Tyler's method, quite simply, is systematic problem solving organized into a framework. The framework outlines curricular function, organizing principles, and organizing structure in a linear, four-question sequence, a paradigm that responds to a learning problem in an organization. The sequence features four questions which the developer should think through and answer if a curriculum is to be responsive and solve the problem:

1) **What educational purposes should the school seek to obtain?**

2) **How can learning experiences be selected that are likely to be useful in obtaining these objectives?**

3) **How can learning experiences be organized for effective instruction?**

4) **How can the effectiveness of learning experiences be evaluated?**

Such questions may be--and have been--reformulated as tasks more familiar to developers: <u>selecting</u> and defining learning objectives;

selecting and creating learning experiences that are appropriate; organizing learning experiences to achieve a maximum cumulative effect; and evaluating the curriculum to furnish a continuing basis for necessary revisions and desirable improvements.

In this sequence the most crucial step is the first, Tyler said. All other steps proceed logically from the statement of the objectives. The objectives should form a basis for selecting and organizing learning experiences and for later forms of evaluation.

Selecting these objectives is to be done as a result of a) studies of the learners, b) studies of contemporary life outside the school setting, c) suggestions about objectives from subject specialists, and d) the educational and social philosophy of the educational facility. A careful diagnosis of learning needs should be made. Irwin Goldstein's (1974) work on training program development has strongly endorsed this notion. The diagnosis, considering the sources of input used, is to provide a basis for formulating learning objectives. In Goldstein's analysis of Tyler, objectives should be

> aimed at identifying those factors that presumably have precipitated a problem situation and at isolating more data about them to aid in the problem solving. These factors may include students, social or cultural variables, the learning process, organized knowledge, and perhaps the planning process itself (p. 254).

Goldstein concurred with Tyler that a study of the learner as a source of input is essential

> to identify needed changes in behavior patterns . . . which the educational institution should seek to produce. The needed changes would

> be identified as the gap between the present status of the students and the acceptable norms as defined by the teacher and the school (ibid.).

Tyler's next source of input to determine objectives is studies of the learners' contemporary life outside the educational setting; i.e., external factors. Tyler explained why:

> Contemporary life is so complex and because life is continually changing, it is very necessary to focus educational efforts upon the critical aspects of this complex life and upon those aspects that are of importance today, so that we do not waste the time of students in learning things that were important fifty years ago but no longer have significance, at the same time that we are neglecting areas of life that are not important and for which the schools provide no preparation.
>
> It is also needed because transfer of formal training to meet the challenge of life situations is more likely when life situations and learning situations are obviously alike and when students are given practice in seeking illustrations in their lives outside of the school for application of things learned in school (p. 17).

Tyler's third source for determining objectives are subject-matter specialists (or subject-matter "experts"). These are people who contribute technical information, knowledge, skills, modes of thinking, emotional reactions, interests - in a word, <u>content</u>. Subject specialists should indicate to the developer how a topic can make particular contributions to other educational functions that are not generally considered unique to the topic.

Tyler's final source for identifying program objectives is the application of the institution's philosophy of education. The tentative objectives are to be "screened" through the social and educational philosophies of the educational facility. Objectives which are in opposition to the philosophies should be eliminated; those that seem consistent with the philosophies should be refined. Tyler urged developers to incorporate input from key sources, formulate objectives, screen and refine objectives, then go on to the next step of the framework.

The second step identifies the best modes or experiences in the program that will be useful in attaining the learning objectives. Tyler referred to learning experience as the interaction between learner and external conditions in the environment to which the learner can react.

Tyler identified four kinds of learning experiences to be considered: 1) those that develop thinking skills, 2) those to help acquire information, and 3) those to develop social attitudes and 4) interests. Principles that should be applied in selecting suitable experiences are fivefold:

1. The learner should have experiences that provide opportunity to practice the behavior implied by the objective.
2. The learner should receive satisfaction from behavior implied by the objective.
3. Reactions desired in the experiences should be within the range of possibility for the students involved.
4. Several experiences can be used to attain the same objectives.
5. The same experiences will usually bring about several outcomes (Tyler, pp. 65-68).

The third step in the framework is the organization of these learning experiences into units and courses. Tyler outlined three criteria for effective organization - **continuity, sequence,** and **integration.** He suggested the learning experiences be organized in one or more of the following ways: chronology, breadth of application, description followed by analysis, specific examples followed by broader principles (to explain the examples), and specific parts used to build larger wholes (in an attempt to build an increasingly unified picture). He further prescribed that learning experiences be organized as a) specific subjects (such as history, English, philosophy, etc.), b) broad fields (such as the humanities and life sciences), c) a core curriculum (combined with either broad fields or with specific subjects), and d) a unit which includes the total program. Any combination may apply to a setting, he said.

Tyler's fourth and last step is evaluation. This is "a process for discovering how far the learning experiences as developed and organized are actually producing the desired results [and] "will involve identifying the strengths and weaknesses of the plans" (p. 105). Evaluation is to include analysis of the content as well as the process used to develop the content.

Management Development Frameworks

A stated aim of many training and development programs is application to organizational needs (Von der Embse, 1973). The literature is replete with models that parallel the systematic approach of Tyler. Most of these models prescribe a close relationship to the organization's purpose and needs.

Typical frameworks guide a participant toward reaching prestated goals and objectives. They urge the participant to increase "satisfaction" through appropriate learning modes and experiences that transfer later to the job, to experience growth, and to increase the potential for upward movement within the company.

Yet one key difference does exist between Tyler's framework and the frameworks prescribed in business: In the business literature, a study of the learner's needs is preceded by a study of the organization's needs. Aside from this difference, the essential elements of an ends - means rationality are similar in both models. Both types are recognized as the best means available for solving instructional problems in a given setting.

The MD models appearing in the literature are indeed numerous but not very different from one another. A single, composite framework can be used to represent most of what has been said. The composite would feature five questions (below) urging a developer to think through the learning program, if that program is to be responsive to a learning problem:

1) **What organizational purposes does the MD program seek to obtain?**

2) **What training or development purposes does the MD program seek to obtain?**

3) **How are learning experiences or modes of training selected which help attain the objectives?**

4) **How are the learning experiences or modes of training organized for effective instruction?**

5) **How is effectiveness of learning and of the MD program evaluated?**

These questions may be--and have been--reformulated as tasks more familiar to developers: diagnosing organizational needs, selecting and defining learning objectives, selecting or creating learning experiences or modes of training that are appropriate; organizing modes of training to achieve a maximum cumulative effect, and evaluating the MD program to furnish a continuing basis for necessary revisions and desirable improvements. (Occasionally, questions one and two have been recombined for more efficient diagnosis.)

The first of these events in the composite framework--diagnosing organizational needs--is considered most crucial. A diagnosis must serve as the basis for all other events in MD development. "Organizational objectives should be the ultimate concern of any training and development effort," said Von der Embse (1973, p. 908). For it to be truly useful, the program must address organizational needs (ibid.). Some authors have suggested a study of the organization's skill and efficiency profiles must be made, under the assumption that some performance "ill" exists in the organization body which, at least in the early, tentative stages of program development, can be cured by training (Lawrie, 1979). This "pre-project study" (as described at AT&T) or "needs analysis," as it is often called, will bring to light critical performance deficiencies in the formulation of MD objectives (Mandt, 1979).

Sources of input for the analysis may well be varied, according to this framework. Suitable examples are the present or future participants in the program, the organization's norms and variables, the charter and constraints of training, resources, related memoranda, and documents. Lawrie (1984) has found

> it is best to assess . . . feelings [about the organization's problem, about training and development] and the commitment that goes with them in two sessions. First [he says] talk to the supervisor and make sure he or she sees that [the problem] is a training problem. Then, in a separate session, go through the same process with his or her subordinates (p. 18).

Those steps completed, the program developer is advised in the framework process to review documents that may contain prescriptive and descriptive data on the participants' job functions and responsibilities. The aim here is to identify inconsistencies between what is organizational <u>policy</u> and what is actual job <u>practice</u>, between what <u>should</u> be done and what <u>is</u> being done. The action is coupled with the developer's own observations of representative on-the-job behaviors in an effort to bring the problem situation more clearly into focus. The developer here decides whether the organizational problem is likely to be remedied by training.

If judged to be the case, **the next question in the framework is explored. This question relates to the training and development purposes the MD program seeks to obtain.** The organization's culture, resources, and goals should be reviewed. The intent is to frame suitable <u>training</u> goals and objectives that proceed legitimately from the organization's goals and objectives. This action corresponds to Ralph Tyler's first question concerning the purpose in education which the school seeks to obtain. The program developer looks at where the management team has been versus where it should be in relation to goals and needs. Questions contributing to this step include these: How are significant changes to be brought about in the learner's behavior? What related behaviors are currently assumed? In what ways are the targeted behaviors related and unrelated to the needs and culture of the organization? What are the sources of input for the program that are external to the MD program and to the organization? In what ways can the expertise of subject matter experts be brought to bear?

One summary question might here be asked, company policy permitting: How well are the individuals "fulfilling their present roles in the organization?" (Lawrie, 1979, p. 594). The purpose is not to be indelicate but to arrive at the most relevant learning objectives possible. Indeed, to extract this information, the developer might have to review such proprietary information as performance appraisals and nontraining variables not to be fixed by the program (Lawrie, 1984). The developer should conduct a job study of each responsibility and express each responsibility in behavioral terms in order to preclude "wandering, unclear personality traits like 'perseverance' or 'motivation' in determining performance needs and deficiencies" (Lawrie, 1979, p. 595).

The diagnosis is considered extremely important. It should be a thorough and behaviorally based effort. The developer is advised through the composite MD framework to match behavioral deficiences with what should be formulated as observable, quantifiable learning objectives. Following that, the person determines the scope of the curriculum--a single job, a department, the whole organization. Scope is determined in ways that logically follow the organization's structure or functions, e.g., marketing, purchasing, etc. (McKenna et al.).

The developer should then identify input and output conditions or factors (i.e., results produced by behavioral statements of function and responsibility), as well as standards, criterion test items (e.g., accuracy, timeliness) and should begin visualizing possible training approaches, contingencies, and lesson specifications. Organizational needs, culture, constraints, and other determinants are considered.

The important question to be explored by the developer is this: How are learning experiences or modes of training selected which help attain the objectives? This third step in the MD framework corresponds to Tyler's second question. Here the developer is to identify or recruit "the people who will participate in the curriculum design effort" (McKenna et al. p. 79) - key management, subject-matter experts, a curriculum committee, and select participants, as appropriate. Subject-matter experts are important because "they provide the basic information on work performance and the skills necessary to support that performance" (ibid.).

Further questions contribute to this step: What will be the learning experiences or modes of training (lecture, workshop, self-paced booklet, outside course, etc.)? "Is the effort to be focused on present assignments, future assignments, or a combination?" (Lawrie, p. 596). Should the faculty be comprised of in-house people or outside consultants, or some combination? (ibid). How would the learners practice the behaviors implied by the objectives? How will the modes and experiences relate to thinking skills, acquiring information, developing interpersonal attitudes, developing career interests, technical skills and information?

The framework prescribes there be some recognizable similarity between the training situation and the job situation. This, according to Wexley and Latham (1981), will enhance the validity of the program. AT&T, a large company that applies training development standards, performs a "developmental test" on the material thus far selected to determine its suitability for <u>this</u> audience and <u>these</u> objectives and decides whether the development effort, as it is progressing, is valid for the stated goals and needs. Wexley and Latham's comments on learning experiences have paralleled those of Tyler; that is, provide as many experiences as possible relative to the goals and objectives being taught; provide a variety of examples when teaching concepts or skills; design the training content so the trainees see relationships; field-test the material and refine it.

Question four of the prescribed MD framework asks: How are the learning experiences or modes of training organized for effective instruction? This is a reformulation of Tyler's third question and involves the organization of "all the training content into modules and [the identification of] logical sequences" (McKenna et al. p. 82). Subset questions ask: What method or process should be used? How would continuity be achieved? How is sequencing to be accomplished? How should the experiences and modes be integrated so as to focus on the goals and objectives? Additional questions may be asked on how the learning experiences or modes of training are to be organized chronologically, how they may be organized through a breadth of application approach, how they may be organized through description followed by analysis, and how they may be organized through concrete examples leading to general principles.

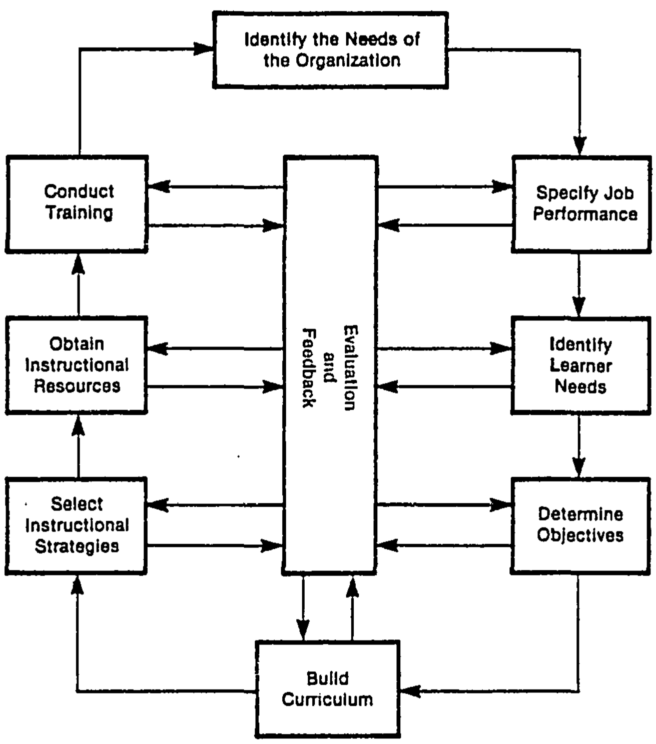
The final step addresses evaluation. The developer should explore the question: How is the effectiveness of learning and of the MD program to be evaluated? Evaluation refers to measurements on the desired results of learning. It refers also to the efficacy of the MD program as constructed and, for some authors, the assessment of each event in terms of the previous events "in consideration of participant feedback" (Nadler, 1982 p. 13). Evaluation is to be formative and summative.

Answers are sought to additional questions: How is the extent of learning to be measured in each participant? How will desired results be measured later on the job? How will the goals and objectives be assessed for possible reformulation? How is the validity of learning experiences and modes to be assessed? How will the overall MD program be evaluated? How are program changes to be made? Lawrie believes that evaluation through continuous feedback "abolishes training and development that is reactive and fad-bound and, over time, lends itself to ever more precision. [And] when this happens, people grow" (p. 596). Objectives, activities, and evaluation should therefore form a continuous feedback loop.

It may be useful in understanding this composite framework to describe two actual models depicted in the literature. It should be noted how similar they are to one another and to Tyler's own model. Degrees of emphasis do vary between the authors, according to style and preference.

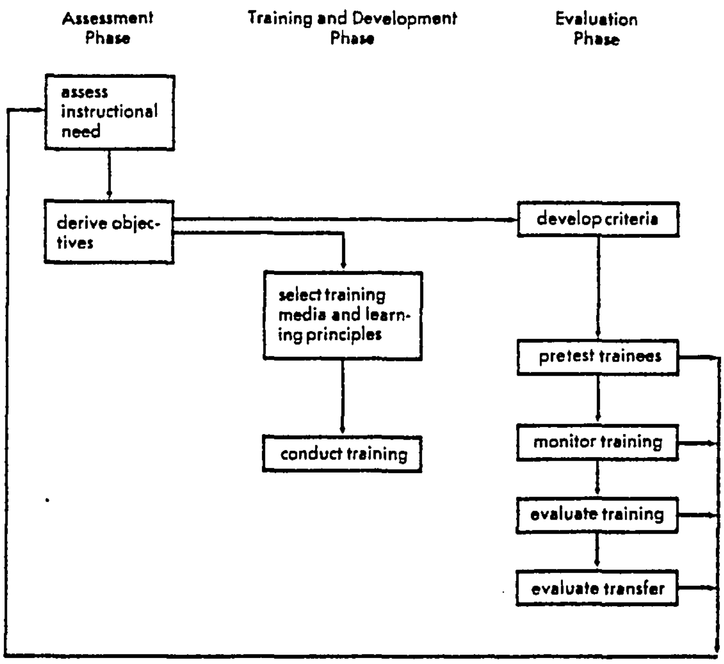
In Figure 1, Leonard Nadler's model centers on evaluation and feedback to drive all the "critical events" of systematic development.

Figure 1. Nadler's "Critical Events" MD Model (1982).



In Figure 2, Irwin Goldstein's model indicates three phases in the MD development strategy: an assessment phase, a training and development phase, and an evaluation phase.

Figure 2. Goldstein's Three Phase MD Model (1974).



Support for and Criticism of Such Frameworks

Endorsements for the systematic approach are provided through testimony, through numerous adaptations of Tyler's method, and through precedent. Actually, Tyler's approach has no serious competition, but it does have critics.

The consensus concerning MD program development in general is that too much accretion or similar nonsystematic means is in current practice. The phenomenon inhibits the ability of a program to increase the levels and ranges of skills designed by training to improve job performance (Wehrenberg, 1984). Job and organizational performance are almost always stated as primary goals of management development.

How, then, should performance levels be increased through MD programs? According to the literature, three activities pertain:

1) an accurate **diagnosis** of organizational and individual skill deficiencies

2) the identification of suitable **activities** or modes of training which might serve to correct imbalances or mismatches in deficiences vs. organizational goals and needs

3) **evaluation** (Wehrenburg, 1984).

The first action, diagnosis, takes on particular significance, says Mandt, when targeting the lower levels of management. Too often first-line supervisors simply do not know their deficiencies in relation to the organization's goals and needs. Through rationality and control, MD can accomplish meaningful results, stated Levitt, (1976).

Authors (as below) have insisted on a systematic diagnosis of both present and future development needs of the organization and of its managers. The purpose is to achieve a program strategy that is forward-looking and not disparate or episodic (Lawrie, 1979). The diagnosis should be

> front-end loaded with data, not an effort based on the needs of the trainers, nor fads, nor episodic hit-or-miss tactics. It should involve several inventory steps and several matching steps [that] taken together . . . yield an overall training and development strategy (p. 594).

The literature gives solid support for a curriculum that is developed as "a logical whole within the context of a given job, a department or an entire organization" (McKenna et al., 1984, p. 27).

A program is good if it "involves the interaction of a . . . management employee, his manager, and the total work environment" (Mandt, p. 395). Indeed, Zaleznik (1979) acknowledged the importance of an orderly solution of goals and purposes, of a rational design, of the direction and control of activities needed to achieve goals, and of some type of logical assessment for this entire interactive process.

Tyler's framework has often been considered the embodiment of the systematic approach. Some have felt it is a valid accommodation of the diverse schools of thought in curricular practice (Kliebard, 1975; Tanner and Tanner, 1980) that includes the requirements needed for orderly and meaningful curricula, a framework that takes into account the interaction of necessary factors, elements, and sources of input. These sources--the nature of the learner, codified knowledge, and society--are widely cited. Should a curriculum fail, it has been suggested, it will fail "because it did not take into account the vital interaction of these three sources" Tanner, 1980). Tyler's is the only framework "that gets results" in terms of minimum competencies and other measurable standards (English, 1980). Through the framework, developers are able to anticipate "future implications of current decisions [and] better relate education and training systems to social demands" (Lewis, 1980). Marilyn Winters, Director of Instruction for the Las Virgenes Unified School District in California, said the framework alone is appropriately systematic, structured, and interactive for the educational problem (Dec. 1980).

Support is also rendered by history and precedent. Tyler's efforts are a synthesis of work done earlier by Dewey (1929), Rugg (1926), and Giles, McCutchen and Zechiel (1942). It follows from attempts to "codify" knowledge in some kind of systematic or "scientific" way, to analyze learning "activities" as discrete units, to "engineer" curricula (Bobbitt, 1918, 1924; Caswell and Campbell, 1935; Charters, 1923). Added to the formulations of Dewey and to the determinants of Giles et al., these earlier efforts were later brought into focus by Tyler. He "has made sense of . . . much in the curriculum field that was confusing or overwhelming and [has given] us a procedure for analyzing and understanding the process of curriculum development," stated Louise Tyler (1970, p. 28).

Since it first appeared, the framework has been endorsed by many authors seeking to refine or expand it for their own purposes. For instance, Tyler's first question on goals and objectives has been addressed by such notables as Bloom (1956), Harrow (1972), Krathwohl (1964), Mager (1975), Popham (1972), and Skinner (1954). Tyler's sources of input and his use of interrelationships have been expanded or altered in the writings of Goodlad and Richter (1966), Huebner (1966, 1968), Johnson (1967, 1969), Macdonald (1966), Phenix (1962), Schwab (1964), Scriven (1972), Taba (1962), and others. Although it is certainly true that some of these experts have registered objections, all have agreed with one or more elements or concepts of the framework. Significantly, the Tyler model has stood as the capstone of curriculum development for planners who envision curriculum as a complex process.

The endorsements for Tyler have not escaped notice by imitators. Three variations of the framework (below) illustrate how, in a different manner, Tyler's work has been modified. In the first variation the author used Tyler's questioning scheme. In the second the author reformulated the questions into steps. In the third the author expanded on Tyler's own four steps.

Illustration one. The curriculum developer should ask three questions, said the authors:

1) What will your students be doing when they are demonstrating the proficiency you describe in your objectives?

2) Under what conditions will these behaviors occur?

3) In each case, what is to be the level of acceptable performance? (Brown, Lewis and Harcleroad, 1977)

These questions are supposed to have followed from even more basic questions that have had to be answered "for as long as schools have existed and wherever they have existed" (p. 4), namely:

1) What should schools accomplish? What goals should schools help learners achieve?

2) What learning activities should students undertake in order to reach these goals? In what modes should these activities be conducted?

3) In what physical environments should these activities be undertaken? What resources - personnel, facilities, materials, and equipment - should be employed?

4) What evidence should be gathered, and through what means, to aid in judging the extent to which learners actually reach goals? As a result of studying that evidence, how may the system be improved and better results ensured the next time around? (Brown et al., 1977, p. 4)

Illustration two. The author (Payne, 1969) in this prescription urged the developer to apply three guidelines for analyzing curriculum plans: 1) statement of goals, 2) specific activities and methods, and 3) general emphasis of these activities.

Illustration three. Hilda Taba (1962) expanded on Tyler's framework. By including a diagnostic step to precede the statement of goals and objectives, Taba has in effect linked the notions of Tyler to those in the MD literature. Taba's sequence follows:

Step 1. Diagnosis of needs
Step 2. Formulation of objectives
Step 3. Selection of content
Step 4. Organization of content
Step 5. Selection of learning experiences
Step 6. Organization of learning experiences
Step 7. Determination of what to evaluate and of the way and means of doing it.

Tyler's work has been found to be so widely accepted in the literature, it is no longer footnoted and rarely cited. Yet criticisms have been leveled, as outlined below.

A principal argument against the framework concerns its rather simplistic treatment of learning, perceived by some people to be anything but a simple phenomenon. Tyler's ends-means rationality appears to disdain what are considered "human" variables, factors that should interact personally with a teaching strategy (Cremin, 1975; Eisner, 1979; Kliebard, 1975). It was claimed the framework contains mere fragments too disjointed to form an integrated whole and so prevents the dynamics of teaching to interplay with the phenomenon of learning. It is too simple, said Schwab (1970), to transform "the crude raw material that [learners] bring with them to school into a finished product" (p. 81).

In those instances where Tyler's four questions were accepted, they were apparently done so in a different, more comprehensive model, for example, in the decision-making model presented by John Goodlad (1968). Goodlad's model urged developers to apply levels of instructional, institutional, and societal decisionmaking to Tyler's oversimplified framework. This overlaying action is supposed to allow better, more comprehensive decisions and more effective answers as one progresses through the curricular process.

Some authors (e.g., Huebner, Macdonald) have objected to Tyler's scant attention to values and traditions, particularly aesthetic and ethical values. Tyler's model seems almost to encourage value-free, tradition-free curricula that come close to being deterministic or unrealistic. And despite good intentions, Tyler permits little or no "conceptual pluralism" in a curriculum--i.e., the variety of philosophies, norms, and biases deemed essential for rendering personal and organizational meaning. Specific questions of value in education have been left floating by Tyler without a suitable curriculum forum for grounding them (Macdonald, 1980). Macdonald said valuing in curriculum development cannot and should not be ignored, but reckoned with appropriately.

Thus Tyler was said to ignore what is most human about people--their learning rate, their achievements, their aspirations. "Where are the people," asked Macdonald (1980), in this mechanism so "devoid of heart and soul?"

Some indeed were critical of Tyler's apparent failure to integrate learning method with learning content. His framework provides too little guidance, perhaps even a trap, on how learning is to be achieved and on what learning is to be achieved. Dewey (1929) had illustrated this point in a reading example. When a developer fails to make a method-content integration, the learner

> can learn efficiently to read and yet not form a taste for reading good literature, or without having curiousities aroused that will lead him to apply his ability to read and explore fields outside of what is conventionally termed good reading matter . . . . (pp. 9-10).

This sort of failure can place a learner in the position of not being in control of learning but under the control of some learning strategy. Tyler's framework seems not to address this condition.

Critics have also objected to his emphasis on a "logical" sequence for curriculum development, themselves not convinced that logical necessarily means systematic. Tyler insisted that learners see a connection among the elements of a program, either a chronological connection, or one based on causality, on breadth of application, or on a similar relationship. Yet findings suggest people do not always learn logically and "neither the emotion nor the intellect develops serially" (Graves, 1951, p. 212). [We rather] "doubt that principle and application can be taught separately," said Graves (p. 212), as Tyler's work might imply.

Ironically, his framework may even encourage violations of logic. Strict adherence to each step of the sequence and language of the sequence could lock developers into a language system which determines questions as well as answers (Huebner, 1966). This can be considered faulty, "circular reasoning," which scarcely elicits new information about a training problem, much less solves the training problem. Language that is embedded in Tyler's scheme is probably full of long-standing myths which "must be continually questioned, its effectiveness challenged, its inconsistencies pointed out, its flaws exposed, and its presumed beauty denied" (p. 218). In this light, Tyler's framework seems little more than a self-limiting tautology.

Criticism has also been leveled at his requirement that learning objectives form the basis for all achievement and curriculum development. Behavioral objectives may not be necessary or realistic because the practice of formulating objectives (McNeil, 1977) may well violate the integrity of learning by segmenting human behavior. To formulate objectives manipulates learners "for an end that has no present worth for them" (p. 297). Dewey (1929) long ago felt learning is not necessarily based on prestated goals and objectives but often occurs through the education function played out in real time in the real classroom. The feeling has not been uncommon that objectives in any final sense become known to developers only after the completion of training because "education is . . . a process of discovering what values are worth and are to be pursued as objectives" (pp. 9-10). To some educators, not all learning is goal-oriented, as Tyler would have us believe.

Tyler's use of the learners as a key source of input seemed not to be well thought out through his framework. Despite recognition of the learner, Tyler neglected to describe alternate ways of using the learner's time at a given point in the program (Goodlad, 1968). Tyler's concept of learner "need" and ways to assess learners' needs were vague and perhaps of little help in formulating relevant objectives and relevant curricula (Kliebard, 1975). Data that may be collected from the learner or other sources are inevitably biased; "once information has been gathered, there is no 'scientific way' to infer what should follow from the facts reported" (Goodlad, p. 298). Dearden (1966) discussed the trap into which Tyler may have fallen. The concept of need, Dearden said,

> is an attractive one in education because it seems to offer an escape from arguments about value by means of a straight-forward appeal to the facts empirically determined by the expert. But . . . it is false to suppose that judgements of value can be thus escaped. Such judgements without any awareness that assumptions are being made, but they are not escaped (pp. 75-76).

Tyler's difficulties with needs and objectives seem to have carried over to his recommendations for selecting learning experiences. Critics have noted a peculiar inconsistency: on the one hand Tyler advised that experiences be selected by the developer or instructor; on the other hand he defined learning experiences as the interactions between learner and environment (Kliebard, 1975). What relevance or validity can be made of this confusion, critics have asked?

It does seem apparent, observed Huebner (1980), that the advantages we once enjoyed with the framework "have lost their cutting edge." The days are past when "the technological focus of the rationale served to bring the curriculum person into closer alignment with the behavioral scientist and the emerging technical developments in the scientific and industrial sector" (ibid). Tyler is not as relevant today as he was when behavioral science was far and away the most prevalent school of psychological thought, some feel.

One final criticism of Tyler's framework concerns the role that a mentor or "sponsor" can play in developing subordinates. This notion is nowhere included in his framework. Mentors are often considered important on-the-job coaches, counselors, trainers, and supervisors - all rolled into one - sponsors who take risks with people, including emotional involvement that is often needed to awaken talent. "That willingness [to take risks] appears crucial in developing leaders" (Zaleznik, 1979, p. 176). Two examples from the literature are the young Dwight Eisenhower, whose mentor was General Fox Connor; and Andrew Carnegie, whose mentor was Thomas Scott.

Other Approaches

Recognizing that "the education process is the due consideration of [various and complicated] forces" (Dewey, 1902, p. 4), some authors such as Goodlad, Huebner, and MacDonald have suggested that a model be used which is more comprehensive and "human" than Tyler's.

However, no expert has prescribed an alternate instrument. The attempts that have been made are largely Tyler variations; many are alternate philosophies of education, or alternate levels of questioning, or alternate levels of decisionmaking; many are imitations. No usable tool has been developed to compete with that framework.

One direction involves a

> curriculum [that is] organized according to selected areas of investigations . . . [Without prestated goals and objectives] the students . . . select these areas of investigation after having the opportunity of 'exploring,' which is seen as the initial aspect of the learning process. Evaluation would center around the variety of explored activities leading to the areas of investigation (Boyd, p. 30).

Another is Goodlad's notion of the curriculum. His notion implies levels of decisions based on input from teachers **(instructional)**, from the faculty body acting on behalf of the administration **(institutional)**, and from appropriate governing boards and regulatory agencies **(societal)**. These decisions, he said, should be meshed with information the developer collects from other reliable sources (such as the learner) to form a diagnostic profile of the kind of training needed in that setting. Additional sources should include specialists in the behavioral sciences and philosophers (Schwab, 1970).

Another concept involves the organization of the program as symbolic systems. This is a concept said to be valid for transmitting conceptual knowledge (Phenix, 1964). (A fuller explanation of the concept is judged not essential for this study.)

Still another concept features five modalities or value systems by which the language of the five modalities is to "shape" the curriculum process (Huebner, 1966). These value systems are **technical, scientific, political, aesthetic, and ethical.** They give shape to the curriculum through the developer's weighting of "controlling" or "prescriptive" language. (How this notion is made operational was not made clear.) A fuller explanation of the concept may be useful in seeing a contrast to Tyler.

Huebner's **technical** value system espouses an end-means rationality somewhat like Tyler's. A technical value system is based on a skills training model. When the developer frames a curricular model "as technology" (Eisner, 1974), that developer is concerned with the <u>way</u> knowledge is communicated and the way learning is facilitated. i.e., <u>process</u>, rather than topics to be included, i.e., subject. The curriculum is constructed as a content-independent technology of instruction supposedly applicable to a range of learning situations. The developer's task is to understand the processes by which learning takes place, to gear the curriculum toward preserving, maintaining, and improving the organization (or society) as society presently exists.

A **scientific** value system under Huebner guides the developer into basing the curriculum on empirical findings. The system strives to maximize the collection of ever new information that is continually used to improve the curriculum. (The degree of focus which the developer should give to scientific valuing in relation to other value systems was made clear.)

Political valuing is considerd a fact of life in developing curricula. All education activity is valued "politically" in the sense that the activity requires cooperation, support, and respect for the developer. Focusing on political interworkings in an organization is not immoral, said Huebner, so long as personal power and prestige are not the dominant ends being sought. It is needed to gain support and cooperation. This is not only realistic, it is necessary for the creative process of development to go forward.

Huebner's **aesthetic** value system seems exotic. Aesthetic valuing means acknowledging the symbolic and beautifying meanings behind educational curricula. The system claims at least three sub-dimensions of its own: 1) physical distance, where the curriculum is removed from the world of use, its beauty captured through the spontaneity of the classroom; 2) wholeness and design, where the totality and unity of the curriculum's sense of balance, wholeness, integrity, peace, and contentment are valued for effective learning; and 3) symbolism, where the curriculum is symbolic of the meanings felt and lived by the developers. As an important aspect of the curriculum, this valuing system and its three dimensions have artistic, human merit certainly not provided through Tyler's method.

The final system is **ethical** valuing. In curricular matters this translates to an encounter of the learner with the developer, not necessarily with the intent of producing change or enhancing new knowledge or having symbolism, but of realizing the essence of life. In that encounter, life is revealed and lived (p. 227). However, what this means in terms of learning experience was not made clear, except perhaps to reinforce Huebner's position that "the student [must be] viewed [and treated] as a fellow human being, not as an object to be controlled or manipulated" (ibid).

Huebner believes all five systems must be applied to the learning problem and to curriculum development and can improve the quality of education.

In another curricular concept, Macdonald proposed value dimensions which are **sociocultural, psychological, transactional, technical**, and **sequential.** Macdonald urged the developer to answer deeper, more philosophic questions than Tyler does in the making of curricular decisions, questions that are to be superimposed on the four basic ones of Tyler:

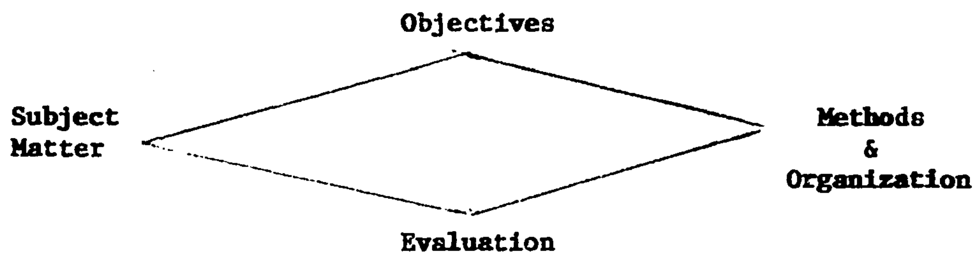
1) **What are our value commitments?**
2) **What is our view of the nature of man?**
3) **What are the socio-cultural forces now operating in our society that we would choose to maximize or perpetuate?**
4) **What are our conceptions of learning?**
5) **What is the nature of human experience in general, and how is it related to learning?**

Education for Macdonald is a moral enterprise. The questions he urged are actually meant as "should" questions to the developer rather than the descriptive "is" questions of more technical constructs. For example, the question, "What are our value commitments?" is meant to read, "What should our value commitments be?" The developer is advised to think through the answer.

Macdonald's **sociocultural** dimension is based upon the concepts of liberation, pluralism, and participation. He suggested that schools be concerned with liberating rather than controlling, that the primary goal of curriculum specialists should be "the development of autonomous, valuing human beings," and that curriculum developers should be acutely aware of students as unique persons and no subject matter, no methodology, is best for all students at a given time. A given instructional program should be personalized, not standardized; it should reflect pluralistic life styles and cultures. It made sense to Macdonald that learners who are required to abide by curricular decisions should have a voice in making those decisions and that students, parents, and teachers are chief sources of input. Tyler's framework was believed not to capture the richness of these concepts.

Still another concept of instructional development has probably more significance for the present study because it does relate so closely to Tyler. Curriculum organization in the <u>transcendental</u> mode had been the subject of an extensive Eight-Year Study published by Giles, McCutchen and Zechiel. Their report described how curriculum development requires attention to four fundamental determinants or questions pertaining to 1) **identifying** objectives, 2) **selecting** the means, 3) **organizing** the means, and 4) **evaluating** the outcomes, similar to Dewey's concerns for reflection and inquiry and to his conception of interdependence and continuity for aims and means. In the Giles approach, the determinants were linked, not in sequence, but as illustrated in Figure 3 below.

Figure 3. Interrelationship of Determinants Under a Transcendental Theory of Curriculum.



(Source: Giles, McCutchen and Zechiel, 1942, p 2)

The Giles model was an important source for the work that was later done by Tyler and cannot rightly be termed an alternative approach.

A final alternate concept to Tyler can be described as a communication model. According to Clark and Yinger (1980), curriculum plans may be **communicated** to the learners in "the form of written materials, diagrams, oral explanations, routine configurations such as reading groups, and even pantomine" (p. 3). The authors found that planning instruction is important for many teachers but

> that actual planning differs from traditional prescriptions for planners. That is, teachers do not follow the linear model of planning (starting with learning objectives and choosing alternatives to meet those objectives) as they were taught to do . . . that there is more than one way to plan, that planning should be compatible with the situation in which it occurs, and that the sun does not rise and set on behavioral objectives (Clark and Yinger, 1980, p. 3).

Tyler's method is simply not followed in many real-life educational settings, they said. More expedient means are often used.

CHAPTER III.

METHODOLOGY

This chapter describes the methods and procedure used in this study. Included are a review of the purpose, format and procedure of the study, a discussion of the **case study** as a methodology, justification for its use in this study relative to other approaches that might have been taken, and a description of a pilot study that was conducted in advance of the case.

Purpose of Study

It was found that management development programs are a fact of business life. Random rather than systematic approaches to their design and development are in frequent use, despite lip service by many American companies given to a systematic approach. This study examined the extent to which the training and development program in one medium-to-large company, as defined by its standing in trade publications, had been developed in accordance with Tyler's framework. That framework, it was found, is a prime example of the systematic approach. The logic of the study centers on the preference the business sector has expressed throughout the literature for Tyler's method.

Format and Procedure

To examine the extent to which program development had followed Tyler's method, the researcher collected evidence on each of his four questions. The company studied was selected because of its size, proximity and accessibility, and willingness to be studied. Questions were explored relating to the

1) educational purposes that the training program sought to obtain;

2) learning experiences that were selected and useful in obtaining the objectives;

3) organization of learning experiences for effective instruction;

4) effectiveness of evaluation.

The actual questions used in the study were formulated and validated through trials so as to relate as closely as possible to the business setting. These questions were the following:

1) **What training or development purposes does the MD program seek to attain? What purposes of 2-3 recent courses (seminars, workshops, etc.)?**

2) **How are learning experiences or modes of training selected which help attain the objectives?**

3) **How are the learning experiences or modes of training organized for effective instruction?**

4) **How is the effectiveness of learning and of the MD program evaluated?**

Subsets of these questions were presented in an effort to secure as much evidence as possible. Appendix A contains the basis from which the questions had been formulated, which is Brubaker's (1980) interpretation of the Tyler rationale.

Data were collected in several ways: a) informal and formal interviews with key personnel, b) direct observation of a training session, and c) examination of training-related documents including training agendas, letters, and memoranda on file in the training organization. The formal interviews were conducted using the Brubaker sequence.

Each interview outline was tailored to a specific participant in the study, these participants being a Curriculum Developer (same as a Program Administrator), Subject - Matter Experts, Participants in the MD program, and one Staff Manager having subordinates in the MD program. Respondent anonymity was assured and proprietary information safeguarded in attempts to extract valid data. Responses were recorded as indications of "yes," "no," "uncertain," or "not applicable" to that respondent. The results from the interviews, document review, and observed training session were profiled onto a matrix for analysis and discussion.

In this study the sequence described by Murray (1970) was used as follows:

1) **Establish the fact** that the phenomenon under investigation [management training development] is inadequate in some respect [lack of systematic approach].

2) **Gather materials** and data from the literature.

3) **Select** from among the circumtances leading to or accompanying the observed inadequate or supposed cause or **causes** [lack of knowledge on how best to develop MD programs; propensity for faddism; lack of commitment, etc.].

4) **Gather materials** relating to the case itself; classify the materials and data.

5) **Use an appropriate statistical procedure** [here simply a matrix, per discussions with different statistical experts].

6) **Write up the case study,** drawing conclusions or making inferences within the bounds warranted by the data.

Case Study As A Methodology. The case study has been defined in ways that relate it to a particular setting. English and Champney (1958) call it "a collection of all available evidence . . . that promises to explain a single . . . social unit." The methodology deals with specific organizational problems; it may identify and analyze complex problems within the setting, usually discusses diagnosis and solutions, and ends with personal decisions being formulated (Wexley and Latham, 1981).

According to Murray, the case study has value because it

> is limited as to time . . . a cross-section of a period in the life of the individual or group [that] will trace the origin and the development of the individual group in a sequence . . . When objective data may be obtained they are used; when they are not to be obtained, the case history utilizes simple description. The case history is generally a combination of the objective and the subjective without discrimination (p. 258).

The setting of the present case was one medium-to-large United States firm. Its organizational "problem" is the extent to which the firm's management training program was or is being developed using Ralph Tyler's framework. Objective data were extracted from training documents yielding evidence of the Tyler sequence; subjective data included the information from personal observation and interviews. Conclusions and recommendations were made in relation to the profiled data.

Use of Case Study vs. Other Approaches

The case method was chosen over such empirical approaches as relationship studies, historical analysis, and survey research to examine the extent to which Tyler's framework had been applied in the company examined. The following reasons for this choice also pertain:

1) Multivariate analysis implies the inclusion of many or all possible MD variables. That method and the survey feedback method require a large sampling of training-related documents, personnel, and other possibly related data and phenomena that must be validated as representative of the class to which the MD problem belongs. The researcher chose to observe in detail a small sample of such items from one medium-to-large company.

2) "Data collection tools [such as questionnaires] are used in survey research to obtain standardized information from all subjects in the sample. If he wishes to determine his subjects' socioeconomic status, for example [or the subjects' role in the firm's MD program], the researcher must administer the same instrument to all subjects in many companies. He cannot determine the socioeconomic status [or degree of involvement in the MD program in many companies] of half the sample by questionnaire and then use an interview to collect the same information from the remaining sample. Also, the conditions of administration must be as similar as possible for each subject in the sample. [Finally] it is assumed the information collected by survey instruments is quantifiable" (Borg and Gall, 1971, p. 188).

3) Survey feedback "activities center around actively working the data produced by the survey and designing action plans based on the survey data" (French, 1974, p 678). The researcher was interested in making comments and recommendations based on the data, but not in planning for remedial action. This had been assumed to be within the purview of the company to be studied.

4) The case study method allows the researcher flexibility to pursue responses indicating additional variables that could affect the company's MD development. It lends itself best to the early exploratory stages of research and is greatly useful in establishing by analogy trial hypothesis for empirical testing. "Case studies are unusually fruitful in discovering new relationships . . . in crystallizing the intangibles . . . . What starts out as a vague abstraction gradually evolves into a more concrete description and this may be stated with considerable rigor and exactness for testing" (Murray, 1970, p 260).

5) "Case studies may provide bases for diagnoses . . . open up problems of causal relationships . . . locate and bring out these relationships more definitely. Such investigations may result in merely a description of what happens. But such studies may also become the basis for principles to be formulated and principles to be verified" (p. 260).

6) "Case data come close to the life-facts. Aside from being unusually interesting, the varieties of data which go into a case study have a peculiar intimacy and closeness to the reality being studied. The letters, interviews, reports, recordings . . . and other [similar] documents take on more and more meaning as they are put together and checked against each other" (p. 259).

7) "Many frames of reference may be used to yield data. The case study is potentially the most valuable method known in obtaining a true and comprehensive practice of individuality. It makes a synthesis of many types of data and may include the effects of many illusive and intangible factors in drawing educational inferences. It seeks to reveal processes and interrelationships among factors which condition these processes . . . . [Its] productiveness [in reaching tentative conclusions] comes from the many approaches and frames of references from which the researcher may analyze the case . . ." (Murray, pp 260-1).

8) In addition, the case format was judged appropriate for this study because of McAshon's (1963) stated criteria for its use: lack of information about a

matter, conflicting information about something deemed to be important, an attempt to gain new insights into factors that result in a given behavior or complex situation.

9) Qualitative analysis, such as the case study, has been gaining support because of the increasing data to be evaluated that are subjective in nature.

Conducting a case study implies certain responsibilities of the researcher, according to Paul Diesing (1971). These are summarized below in a manner outlined by Boyd (1983). The activities this researcher has performed to discharge those responsibilities are discussed.

(1) **The observer must be acquainted with the proposed subjects and with a variety of theories that may be applicable to the case prior to going into the field.** This researcher had read published reports of the subjects' organizational environment and had conducted discussions with the training manager and vice president for personnel before undertaking the study. The documents included the firm's annual report and appropriate business and financial magazines listing corporate data. The information indicated the company's medium-to-large size in terms of annual sales, assets, net income, stockholders' equity, number of employees, net income as a percentage of sales and as a percentage of stockholders' equity, savings per share, growth rate, and total return to investors.

Preliminary discussions with the training manager and vice president for personnel afforded data on corporate and divisional structures, organizational culture, extent of training and development activities, length of service, and extent of involvement for the two employees pre-interviewed, and their roles and relationships within the company. The researcher had reviewed the literature to understand the major curriculum theories, models, paradigms, examples, and frameworks that in any way might pertain to the development of management training programs, such as the MD program to be studied.

(2) **The observer's activities in the field are divided into two categories which may be called scheduled and unscheduled.** The scheduled activities in this study included the collection of data through formal interviews using a structured outline. The unscheduled activities included informal (i.e., unstructured or spontaneous) interviews and discussions, examination of training materials and documents, and participation in an actual training session.

(3) **The observer discovers and interprets recurrent themes that reappear in various contexts.** Through interviews and a document review, the researcher noted a pattern that suggested the extensive use of external subject matter experts in MD program development. Another pattern was detected regarding the selection of learning activities.

(4) **Themes and interpretations of themes are tested by comparing them with evidence that is already available or with new evidence.** The contextual validation of a piece of evidence collected was done by comparing it with other kinds of evidence on the same point. An example was the manner and degree to which evaluation of the MD program and of its component courses has been performed.

The following kinds of evidence for cross-checking and reinterpretation were applied:

a) informant statements, which provided information about a variety of events that the researcher had not personally observed, and which were cross-checked by comparing reports from several informants about the same event;

b) written documents, which included memoranda, stated goals and aims, course outlines, and the like;

c) personal observation, which provided evidence of curriculum structure in the manner of Tyler. A training session was observed for evidence of clearly stated goals, objectives, relevant activities, sequencing of the activities, and evaluation. (Similar information was gathered on other sessions not directly observed.)

(5) A model or similar construct is assembled to connect themes and patterns. A matrix of the results collected from the interviews, document review, and training session was constructed to profile data. Themes, patterns, similarities, and differences were viewed for analysis and discussion.

(6) Theoretical implications that will carry over to other cases and a report of the case study must be written. Comments and recommendations were made based on the collected data and the literature's prescription for curriculum development.

An essential component of the case format is the interview. Both formal and informal types were used in this study. The formal interview employed a structured outline having predetermined questions; the informal interview took advantage of casual settings, spontaneity, and informality. The researcher as interviewer attempted to clarify questions not fully understood by respondents; made judgments as to whether respondents had adequate knowledge to answer a particular question; estimated the intensity of respondent involvement in MD program development; and judged whether each response should translate to a "yes," "no," "uncertain" or "not applicable." Such flexibility was needed to discover as many variables as possible for the case and was judged to be consistent with Chinoy's (1964) comment that the case study is a key method which "attempts to convey an understanding of a class or type of phenomenon by the full description and detailed analysis of one or a series of cases belonging to that class" (pp 74-75).

Flexibility was maximized through the case study's techniques - "direct observation, informant interviewing, document analysis . . . and direct participation." Indeed, these are typical and often needed for field studies (McCall, 1969).

The Pilot Study

A pilot study consisting of trial administrations of the structured interview was conducted. The instruments were administered by the researcher after his review of the literature had revealed that no structured questionnaire appropriate for this study existed. The questionnaire was adapted from Brubaker's (1980) interpretation of the Tyler rationale (App. A).

Preparations for the design of the interview trials were organized into nine steps (Henerson, Morris and Fitz-Gibbon, 1978):

1. **Determine** what useful **information** the interview might provide about MD program development. Useful information consisted of indicators to suggest application of Tyler's four questions.

2. **Decide on the structure** and approach of the interview. The researcher decided that a guided interview with a definite agenda, i.e., a set of questions to be covered and asked in a fixed sequence, would be appropriate. Four outlines were designed, each a slight modification of the other in terms of questions asked for the type of subject. Information from the structured interview supplemented data collected from informal interviews. The four interviewing outlines were designed for a (1) Curriculum Developer/Program Administrator, (2) Subject-Matter Expert, (3) Participant, and (4) Staff Manager.

3. **Decide on** the number and sequence of **questions**. Initially all questions on basic company data (page 1 of the interviewing outline) were alike in number and content. The trial interview with each person resulted in varied numbers and types of questions for the given subject. The sequence of the questions followed the frameworks of Brubaker and Tyler.

4. **Draft questions** and critique them. Questions were critiqued to assure that they communicate the intent of the researcher and purpose of the study and that terminology is understood.

5. **Decide how** the researcher is **to summarize** and report the interview data. The data were recorded by the researcher using the interviewing outline and summarized in matrix format.

6. **Add the introduction** and probes. Information was given to the subjects on the purpose of the interview and types of questions to be asked. Terms were explained. The basis for responses was clarified (two-three recent MD courses and/or total MD program); responses were urged on what is rather than what should be. Negative and uncertain responses were declared valid. Probes - questions asked to secure additional data in order to clarify or elaborate upon unclear or incomplete responses - were used to elicit the most valid responses possible.

7. **Select the interview(s) and conduct** a few **tryouts**. The interviewer for this study was the researcher. A pilot study consisting of an interview each with a Curriculum Developer/ Program Administrator, Subject-Matter Expert, Participant, and Staff Manager was arranged to determine and insure the suitability of the interview questions for each type of subject.

8. **Prepare the interviewer(s).** The researcher is an experienced professional who has been conducting similar interviews for five years as part of his assignment as a professional developer in a major corporation. He has read the research literature on the proper methods for conducting interviews.

9. **Make arrangements** for the interviews. All pilot interviews were conducted by telephone in a familiar atmosphere with no interruptions. The assumption was made that the questions, free of nonverbal feedback, must be made at least as clear in the trials as in the actual interviews. The pilot (and actual) interviews were spaced to allow ample time for the researcher to record responses as accurately as possible.

The participants in the pilot study were three employees from the researcher's company who hold positions comparable to those in the firm studied (Program Administrator/Curriculum Developer, Subject-Matter Expert, and Staff Manager), and one training and development professional from the public sector functioning also as Program Administrator/Curriculum Developer. Prior to the trial interviews, all four members of the researcher's doctoral committee had been provided with the interviewing outlines for their review and comments.

As a result of feedback and observations from the trials, the following changes to the original outlines were made:

1) Questions on basic data and basic company data (page 1) were tailored to the type of respondent. Questions formerly included on employee status (**page 1, no. 13**) were discarded as unclear or inappropriate.

2) In the Curriculum Developer/Program Administrator outline, several questions were refined, clarified, and/or expanded: nos. **1-E, F**; nos. **3-C, D, G, H**; and nos. **4-B, C.**

3) In the Subject Matter Expert outline, two questions were clarified and expanded: nos. **3-G, H.**

With these adjustments, all questions were deemed by the trial participants and the researcher to communicate clearly and appropriately. The interviews were conducted with the case subjects using the outlines contained in Appendix B. The original and adjusted questions have been noted in the outlines.

CHAPTER IV.

THE STUDY

This chapter details a case study based on the methodology described in the former chapter. As indicated, the purpose of the study was to examine the extent to which the training and development program in one medium-to-large company had been developed in accordance with Ralph Tyler's framework. Tyler's framework is the systematic method for developing curricula that is most prescribed in the literature.

Included here are a description of the case; written summaries from formal interviews (the Curriculum Developer/Program Administrator, two Subject-Matter Experts, two Participants, and a Staff Manager), findings from the training document review and from the researcher's participation in an actual training session, and comments from the researcher's informal discussions with several company employees.

Description of the Case

The study focused on the management training program of a company that had been determined to be medium-to-large in size by virtue of its standing in trade magazines, specifically, Fortune (April 30, 1984) and Control Data's 1983 edition of The Second 1,500 Companies. In addition, figures that had been obtained from the company's 1983 annual report were matched against industry norms to suggest it is indeed medium-to-large among United States corporations.

The firm employs between 1,000 and 2,000 people. Net earnings exceed $2 million annually. Despite recent dips in sales, net figures over the past two years have improved by more than 40% to about $135 million in annual sales.

The company manufactures certain metals and related machine, stone, clay, and glass products. It has been cited for outstanding architectural achievement in metal fabrication. Three divisions and two subsidiaries totaling 21 locations comprise the firm; all are located in the Southeast. The company employs 200 management personnel that are spread over five vertical levels.

One spokesman expressed appreciation for the company's fine support for employee memberships in professional and civic activities and indicated such fees are subsidized. Employees in training administration are encouraged to have working relationships with the academic community. It was apparent the company's attitude toward its personnel is, in the words of one employee, "paternalistic [and] caring." The company provides for the total financial support of all training and development conducted in and out of the company. Employee turnover appears to be negligible.

The six employees who participated as subjects in this study seemed to be open, cordial, and cooperative. One employee is the company's Program Developer and Training Manager. Two were considered Subject-Matter Experts for the purpose of this study in that they had supplied contextual data for some course designs. Two others have been Participants in one or more of the courses. One is a high-ranking Staff Manager. All six employees were selected to be subjects in the study by the Training Manager on the basis of their availability. The subjects' functional titles rather than names were referred to in the case study to maximize candor and ensure anonymity. The name of the firm was also kept anonymous.

Formal Interviews

Responses from the structured interviews were obtained using the outlines contained in Appendix B. The responses were keyed to those outlines and were gauged by the interviewer to mean that the item suggests positive adherence to Tyler's framework ("Y"), no evidence of adherence ("N"), uncertainty on the part of the interviewer ("?"), or nonapplicability of the question for that subject ("N/A"). (This last category had been predetermined in the pilot study.) The interviews were conducted on the office premises of the subjects. A brief description of each respondent with a synopsis of each interview follows.

Curriculum Developer/Program Administrator. The subject is the "developer" of the MD program. She was promoted from within the company to formalize management training and to administer the program as part of the Industrial Relations Organization. She has been functional in that assignment for about four years. She bears the title of "Training Manager."

In her capacity as developer, the subject a) determines training and development needs, b) obtains input from company Subject-Matter

Experts on content, c) arranges for external consulting intervention, d) schedules attendance, e) trains or co-trains in select courses, and f) assesses participant feedback. Rather than design or produce courses, manuals, etc. as a primary activity, she coordinates and schedules training and appears to select some learning experiences. Her responses during the interview were inconclusive as to whether the MD program had been developed using Tyler's framework.

To the questions on aims, purposes and goals (question number one of the interviewing outline), the subject's responses were varied: "knowledgeable, participating management staff," "qualified, productive, motivated work force," "to inject order," "to develop a written framework for the training program," "to continue to develop a tape library," "be a forum for situational leadership training," "research conditions," "manage time," "conduct meetings to determine the needs of key managers at least yearly," and "relate training to the organizations." Her responses were unclear concerning specific learning objectives.

She listed several ways by which significant changes are brought about in the learners' patterns of behavior: "role modeling," "repetition and encouragement," "exposure to state-of-the-art philosophies and techniques." She said new behaviors are indicated early in the program by "more open communication," "more ease in dealing with change," "a lessening of tensions," "succession planning." She admitted much learning has been "on-the-job" and stated the assumption that participants are "bright, innovative and open to change."

It was not clear from her responses how the targeted behaviors relate or do not relate to the content of the program. "Education, not training, is the main thrust" of this program, she said, and learner behavior does somehow relate to top management's guidance and to the needs and culture of the business. She did not elaborate.

The subject then listed a number of external sources that had been used or considered as input to the MD program. The only restrictions on their regular use is "poor timing or scheduling." She said the program accounts for the company's philosophy of training and the learner's psychology through "personal interpretation" of the content in organizational terms and reinforcement theory, respectively. Individual learner differences are not accommodated.

Her responses to question two concerning the selection of learning experiences or modes of training were almost exclusively "Y" (Yes). She outlined typical modes employed in the program: "involvement, demonstration, workshop, case study, lecture, in this order of importance." Their relative usage she estimated to be, respectively, 40%, 20%, 20%, 20%. Each mode is selected "according to my determination of need." Any modes not used are rejected because of her own "inexperience or discomfort"; these include programmed learning, computer-assisted instruction, and commerical videotape, she said.

Concerning how learners practice the behaviors implied by the objectives, she responded: "role playing, hands-on, and on-the-job training." She related these to thinking skills, to acquiring information, to developing interpersonal attitudes, and to technical skills and information. She offered no indication as to how the modes of training in the program relate to developing the participants' (career) interests.

Question three concerned the organization of learning experiences or modes of training for effective instruction. The subject's responses were frequently "N." She identified herself as the person who organizes the experiences and modes but did not name the method or process she uses to make selections. Continuity and integration are achieved by having all training "funneled through this office." But specifically how sequencing, chronology, breadth of application, and description followed by analysis, except for some case study applications, are typically achieved, she did not say.

Her responses to question four on evaluation gave many "no indications" of adherence to Tyler's framework. She provided little or no data on how learning is measured in each participant, on how behaviors are measured on-the-job, on how assessment of learning experiences/modes is validated, or on how evaluation of the overall MD program is performed. She said subjective impressions and informal discussions prevail. It was uncertain from her responses how learning results are measured; how goals and objectives are assessed for possible reformulation; and how MD program changes are made, who makes them and why. She indicated that consensus by top management was the basis for making changes to the MD program.

Subject Matter Expert <u>A</u>. The subject is a middle manager, who has been on the staff for about six years. Part of his responsibility is to contribute contextual data for training courses within his field of expertise and to advise on course development. The respondent expressed both interest and involvement in the concept of MD and of its development and began to identify the purposes of the program and modes of training. He did not specify a structure or pattern for use in organizing the experiences or forms of evaluation in the MD program. He said he was aware of no overall structure.

The program's aims and purposes, he said, are "to develop middle management to progress higher and to qualify our entry level people for higher jobs." Through this program our goals are "to take people with little or no management training and education and broaden their basic knowledge." At the moment "we are in an incipient, developmental stage" of this program, so our specific learning objectives are only "hit-or-miss." Frankly, "we don't . . . know what the target behaviors of the learners are supposed to be [but the behaviors] somehow relate directly to strategic planning . . . . Increased competition and certainly the bottom line are translatable to the "needs and culture of our business," he continued.

The subject reported that his suggestions as a Subject-Matter Expert are almost always considered. He is "in a position to see the total picture [of training needs]," he stated; indeed, his very job description requires such input. In response to how the company's cultural norms are addressed in the programs, he gave no indication.

"They are probably not." However, a number of outside training sources are used "after we've investigated a need."

On question two -- selection of learning modes and experiences -- the respondent named the lecture with discussion (50%) and the case study (50%) as two of the principal modes of training (a response that seemed to rule out all others). The modes are selected by a sponsoring agency, either the company's own Training Organization or an outside consulting firm, as the case may be. Such "modes are built into the program." The case study is used so frequently, he said, because it enables learners to "diagnose their own cases" and take relevant actions. The case experience is the very essence of practicing the behaviors implied by the program's objectives, he suggested. One mode not acceptable to us is "pure" lecture because this "is not as retainable."

The subject then related modes and experiences to thinking skills via "the problem-solving mechanism"; to acquiring information "from lecture interactions"; to developing interpersonal attitudes "through seminars, which inadvertently affect interpersonal skills"; to developing (career) interests "by expanding their professional horizons; and to technical skills and information because "most of what we do is directly related."

His responses to question three -- organization of the learning experiences -- gave more "no indications" of adherence to Tyler than other indications. It is <u>he</u> who organizes experiences and modes, he stated, "based on preconceived needs." The corporate staff provides input. He expressed some doubt that continuity is achieved in the MD program and also doubt regarding sequencing and the integration of focus on goals and objectives, although "we are trying to do this . . . . [So far] only in our minds have we begun to organize training modes chronologically. He identified one course in the program, the "Management Academy," as a course which probably has used a breadth of application approach, and two others "Strategic Planning" and the Xerox training seminars, having used description followed by analysis. The case study is frequently applied to induce examples leading to general principles, he said. He did not relate these items to the total MD program, suggesting they were probably not addressed.

His responses on evaluation -- question four -- did not indicate adherence. "No formal measurement is used in the program. [We do use] personal observation by management" as well as the learners' manifestations of changed "strategies" on the job. He said participant reactions and the staff's impressions of training are considered in the reformulation of goals and objectives, but for a given course only. Feedback plus "consensus" and "one-on-one discussions" among top management form the basis for validating learning modes, for evaluating, and for making MD program changes.

Subject-Matter Expert B. This respondent has been an employee for about 25 years. A number of job changes and promotions have brought him to his current assignment of heading a key staff department. Responses during the interview yielded many "?" (uncertain) or "N" indicators of adherence to Tyler's systematic approach.

The aims and purpose of the MD program, he said, are to "make managers more aware of the process of managing themselves; self-awareness, so they might manage other people." Goals are to foster a "well-managed, profitable company" that would link training to the bottom line. Indeed, the cost implication from decisionmaking is the single, most important reason why "we need to manage our resources and inventories" better; this is accomplished through effective management training. He noted that learning objectives relate to three things in particular: self-evaluation, subordinate evaluation, and the learner's organization as a whole.

T he targeted behaviors included in the program relate to MD content through "personally set goals" -- goal-setting, he said. He did not relate learner behavior to the needs and culture of the business. He rather suggested the program "may be based on the . . . premise that the customer is always right." He did not indicate how his suggestions as a Subject-Matter Expert have been applied in developing the training program or the extent to which other sources have been applied. He said the company's cultural norms are addressed by the company's solid endorsement for employee education on and off the job.

Concerning Tyler's second question -- selection of learning experiences -- the subject's responses were mixed. He named as the program's chief learning experiences or modes of training the lecture (70%-80%) and the workshop or case study (30%). Each is selected by the Training Manager, although he expressed no knowledge of how or why. He indicated how learners are made to practice the behaviors implied by the program's objectives. For instance, time management, effective listening, and personal evaluation concepts "are applied immediately on the job." Training modes and experiences relate to our thinking skills in terms of "my own self-awareness" and to our interpersonal attitudes in terms of "my own favorable treatment of subordinates." "Learning to be fair and firm" has been crucial to the development of his own interpersonal attitudes, he said. He declined to recount experiences relating to technical skills and information.

On Tyler's question three-organization of the experiences and modes - the person gave responses that were for the most part classed as "no indication". He said the Training Organization organizes experiences/modes and that continuity is achieved by having all courses in the program offered "across the board." However, his other responses on method or process, sequencing, integration, chronology, breadth of application, description followed by analysis, and examples to general principles all gave no indication of having been applied in MD program development.

His responses were primarily non-indicative on question four - the effectiveness of evaluation. He again identified the Training Organization as the agency through which feedback is funneled and by which program changes are made. He offered no specifics as to how actual evaluation is done on desired results, behaviors, or validity of training modes.

Participant A. The respondent in this interview is a third level manager responsible for an important line function. He has served in that capacity for about 15 years, with over 20 years' service to his credit. The responses he presented seemed thoughtful and definitive, but largely nonindicative of adherence to the framework.

He began by saying the aims and purposes of the program are to "better enable managers to supervise their employees." He listed the following goals: 1) "better educate our supervisors through training in reducing costs; 2) improve our productivity and quality; 3) enhance our involvement in community affairs; 4) make a fair profit; 5) be a community leader; and 6) develop better employees and community citizens." His response on specific learning objectives was questionable to the researcher but seemed to deal "with people on a day-to-day situation through one-on-one discussions of typical business problems." This objective came out of "the last management seminar," he explained.

Significant changes in the learner's patterns of behavior are brought about "by beginning to apply what we learn and to appreciate the positive results, including attitudes." "More positive behavior" is the actual change sought by the MD program. The subject did not indicate what or how related behaviors are assumed to exist in the learners before course attendance, except perhaps to suggest that "everyone needs [both] a refresher in dealing with everyday problems and the exchange of new ideas and information among peers." In his own case, the targeted behaviors included in the courses he has so far experienced have not been significantly changed because the content was for him a refresher. He did not indicate how targeted behaviors relate to the needs and culture of his business nor was he specific as to how the psychology of the learner or individual differences had been applied in the program's development. Indeed, the company's training program "is only about two years old," he suggested.

The respondent gave many "yes" responses concerning question number two -- selection of learning experiences. He identified the prevailing mode of training as the lecture, this followed by "discussion" (i.e., case study and workshop). A respective 75%/25% balance exists between the two modes, he estimated; the Training Manager, using a method not known to the respondent, selects each mode. Training modes that are not used but "should be" include those in which "vertical levels of management participate in different training." The present condition lumps all levels of participants in the same training, he explained.

He noted that learners practice behaviors implied by the objectives through "class demonstration, problem-solving, one-on-one." He said the modes of training relate to thinking skills in the classroom through realistic problem-solving; to acquiring information through the accumulation of data needed for problem-solving; and to developing interpersonal attitudes through "mutual respect, honesty, trust, and credibility" that are often encouraged through workshops. However, no training modes seem to relate to developing career interests or to technical skills and information, he stated.

His responses to question three - organization of the learning modes -- fell largely into the "no indication" category. He clearly identified the Training Manager as the agent who organizes experiences and modes but did not say how. He gave no indication how continuity can be measured and suggested sequencing is achieved within "the Training Manager's format." He supplied no indications concerning the integration of experiences on goals and objectives, concerning the chronological arrangement of courses, concerning examples of general principles, and concerning the organizing structure of the MD program ("shotgun effect"). He linked the question on breadth of application to "participant feedback and class problem-solving." To the question on description followed by analysis, he responded by saying "description and simulation [in the classroom]; for example, disassembly of a fountain pen."

The subject's responses to the final question on evaluation were also classed largely as "no indication." He said the extent of learning in each participant is not measured and that desired results are measured only "by attitude and performance changes in subordinates" [of the learners who have completed certain training]. Behaviors are measured "by a display of attitude and by job performance [but] "not knowing really what the program's goals and objectives are makes it difficult" to indicate how goals and objectives in this program are assessed for possible reformulation. He suspected the validity of learning experiences and modes is assessed "during classroom training [in terms of] how individuals approach different problems and [how they devise] solutions." "Only through participant feedback" was his response as to how the MD program is assessed overall.

Participant B. The respondent in this interview is a second-level staff manager with over 20 years' service, the last 15 in the current assignment. Her responses did not especially indicate that development of the company's MD program was accomplished through Tyler's framework. Many were nonindicative of adherence.

The aims and purposes of the company's program, she said, are to "develop people to become good supervisors." The goals are to "become aware of people, their needs, their problems, and to manage to get the job done through people." Specific learning objectives include "knowing the processes of budgeting, reading financial statements," and such others as may allow the learners to discharge their functions better. She did not detail how new behaviors are indicated in a course or in the total MD program, how significant changes in behavior are accomplished, or what related behaviors are assumed before attendance in the program or given course.

In response to how targeted behaviors relate or do not relate to the content of the MD program, she said such relatedness is achieved as we "understand, motivate, and work with employees [and as we learn] to be fair-minded." These things themselves relate to the needs and culture of the business by our "working smarter [and by] making money." She did not specify how the company's philosophy of education had been considered and/or utilized in program development or how the psychology of the learner and individual differences have been accommodated.

She outlined a number of learning modes that are considered typical in the program -- lecture, workshop, self-paced, outside course -- but she assigned 50%-50% usage to the lecture and workshop modes only, to the apparent exclusion of others. She said that "group decision, based on the suggestions of the Training Manager," determines each mode. In the MD program we emphasize "brainstorming and trial and error were empahsized." Modes not used are deleted because of the personal preference by one or more of the members of the decisionmaking group, she explained. She indicated that practice in the behaviors is sometimes achieved "by example [or by] by videotape feedback . . . ."

The program's modes and experiences relate to acquiring information, she stated, "by direction in how to" to developing interpersonal attitudes by "personal sensitivity leading to interpersonal sensitivity" to developing career interests "by continual exposure to new ways of doing things and to technical skills and information "by hands-on experiences, for example, computer training in technical programming." She did not state which modes and experiences relate to thinking skills.

On question three -- program organization - the respondent gave no indication of adherence. She identified the Training Manager as the person who organizes modes of training, using "trial and error." Continuity is achieved because "something [in each course] deals with company employees." She gave no indication of how sequencing is accomplished; how experiences and modes are integrated to focus on goals and objectives; to what degree the experiences and modes are organized chronologically; which experiences and modes use a breadth of application approach, description followed by analysis, or example to general principles, and what the organizing structure of the overall program might be.

All her responses to questions four -- evaluation -- focused on the participants' feedback from given courses. "Wait and see -- no measurement" was her response to how the extent of learning is measured in each employee. "Better communication by the learner later on the job" is how desired results can be measured - or more precisely, "by seeing the manager communicating better." She said "no actual measurements other than perceptions "are used to assess behavior change" and participant feedback is probably the only mechanism we use to assess goals and objectives for possible reformulation. The "proof is in the pudding" when it comes to measuring the validity of learning experiences, she stated. And "application to productivity" is the key.

Overall, the MD program is evaluated by top management in conjunction with the vice presidents of the company and the Training Manager, she concluded. They use "trial and error", she said.

Staff Manager. This respondent is a Staff Manager who ranks near the top in the management chain. He was deeply involved in instituting the MD program some four years ago. His responses suggested clear understanding of the program and of its direction but yielded some inconsistencies regarding adherence to Tyler's framework.

In his words, aims and purposes in the MD program are the "identification of long-term potential successors to top management; the identification of their [training and development] needs; the enhancement of some of their 'people' skills and personal needs; and cross-training in organizational skills." He outlined goals of the program; viz., the identification of employees for management succession and, secondarily, the continual reassessment of "the need to fill vacated positions" [to see if we really need the position]." The program's specific learning objectives are to "treat people like decent human beings; provide them with security; and offer a productive, loving attitude toward employees."

But this program is not designed to "bring about significant changes [in the learners' patterns of behaviors]; the work environment is." The new behaviors that may result from training are indicated through the learners' "better understanding of people problems and [demonstrations on the job of] people skills and [effective] supervisory techniques." Related behaviors to be assumed before training are simply -- but tentatively -- those which show participants "are bright and able." He said the program addresses first through fourth -level management, although attempts have been made to include the fifth level chief executive officer.

The subject then linked learners' behaviors to the content of the program. He suggested that "people skills" contained in the program are closely related to requirements "for actually dealing with people." He related behaviors to the needs and culture of the business in terms of what he felt had been a valid, if subjective, needs survey. "We ask them what they think they need."

The sources of input for this program, he said, are virtually all that we can apply. Those we have used include the Center for Creative Leadership (Greensboro, N. C.), the American Society for Training and Development, the American Society for Personnel Relations, and some surrounding colleges and universities. The content from these sources is assessed and tailored to fit our company's needs, then presented by that source in a seminar or by our own company trainers, if appropriate. The only sources we might not use are those that are not known to us, or are not suited to our culture, or are too costly. Our own Subject-Matter Experts assist by analyzing training needs, he added. Internal sources include "employees, managers, the feedback from seminars, and so forth." He noted that individual differences among the learners are not accomodated in the program; rather, we aim at "some average" level.

The Staff Manager offered many "Yes"-type answers to Tyler's second question concerning the selection of learning experiences. "The Academy, seminars, programmed learning [i.e., videotape, audiotape] -- just about all inside and outside" modes are used in the MD program. "The reimbursement program that covers our employees' tuition costs at local colleges and universities is evidence for our company's commitment to using outside training sources and experiences, if they appear suitable." (His response to the relative usage of each experience was a vague approximation.) Each of the experiences and modes, he said, is selected through a process of "heavy filtration up to me and the President," to include the comments of "each divisional VP." The factor that most determines the selection of training modes is the perception of training needs by all members in the decisionmaking chain, he explained.

The modes of training "we do lack and need more of are cross-training and job rotation," and this lack may be due perhaps to "fear of exposure, to inertia, or to stodgy thinking." It is unlikely that learners are made to practice the behaviors implied by the objectives, except "by way of support" from top management. The subject's responses partially related the modes and experiences to thinking skills and to developing career interests, but not at all to acquiring information and to technical skills and information.

Concerning question three -- the organization of learning experiences -- the respondent gave few "Y" indications of adherence to Tyler and mostly "N" indications.

He identified the employees who organize the experiences and modes, one of whom, he said, is the Training Manager. He cited one mode in particular, brainstorming, as being used in making company decisions of this kind but did not specify the method or process used to organize training. Through his office, continuity is achieved and "the close proximity of all" decisionmakers makes sequencing possible. "Strong communication" is probably the only method used to focus experiences and modes on the goals and objectives of training, he suggested. Even so, the experiences are not organized chronologically, except perhaps through "reaction training." A breadth of application approach is used but only though "Xerox training" and description followed by analysis is used through "leader training" and the company's seminar in quality circle awareness. The subject's response on the use of examples leading to general principles yielded no indication of adherence.

Concerning the issue of evaluation, his answers suggested the use of subjective forms of evaluation only. Neither the extent of learning nor the behaviors are measured in participants, he said, nor is the assessment of learning mode validity. In "subjective" ways the assessment is performed on desired results on the job, on goals and objectives for possible reformulation, and on the overall MD program [by senior managers, who attempt to relate the program to the bottom line]. The vice presidents of the company make program changes based on feedback and perceptions, he concluded.

Training Document Review

The researcher reviewed all available documents on file in the Training Organization in an attempt to extract evidence (App. C) concerning the degree to which the company's management development program had been developed in accordance with Tyler's four-question framework. Findings were keyed to the interviewing outline for the Curriculum Developer/Program Administrator contained in Appendix B.

Indications of adherence to the framework were found to be largely "N." To the extent they existed in the files, indicators focused only on Tyler's first question regarding aims, purposes, and goals for a given course or seminar rather than the total MD program.

One document dated October 8, 1981 revealed the company's new dedication four years ago to organizational change through management training and development. This document appeared to supply justification for the Training Manager's later surveys of training goals through two documents to key management, dated July 1, 1982 and January 21, 1983. A list of potential responses accompanied the first. The returned responses were perceptions of what the trainees needed and were summarized into subject areas (document dated August 27, 1982) entitled "Top Management," "Middle Management," and "1st Line." A memorandum dated January 26, 1984 provided details on the "purpose" of one course. Specific learning objectives were not described in the documents.

Several other documents were found to indicate the firm often receives, considers, and applies external sources of input. These documents include trade journals, brochures, agendas, newsletters, and related promotional materials. The Center for Creative Leadership in Greensboro, N. C. was the outside source most often referred to.

A number of commercial brochures were on the file. Agendas for a "Labor Forum," "Management Academy," and "Quality Circle" were included. Evidence to suggest the use of seminars, workshops, and forums was prevalent. No indications were found to identify the relative use of each mode, the person responsible for selecting each mode, the method of selection, the reasons some modes have been selected, learner practice of behaviors implied by the objectives, or the manner in which modes relate to skills (thinking skills, acquiring information, developing interpersonal attitudes, developing interests, and technical skills and information).

Evidence for the organization of learning modes was scarce. The agendas that were found suggest that experiences had been organized by the sponsoring activity, in one case by an outside agency. Indicators were primarily "N" pertaining to Tyler's third question on organization.

The evidence on training effectiveness and evaluation was found to be "N." The documents in Appendix C indicate assessments have been subjective and based upon participant feedback from individual courses. One document dated August 2, 1982 shows evaluation was performed by the consulting firm sponsoring the seminar. It became apparent through the review that MD program changes are made subjectively on the basis of participant feedback.

Observation of Training Session

The researcher participated in a one-day training workshop sponsored by the company. Indications were sought on the extent to which the session had been developed using the framework and how this training contributed to the overall MD program. The degree of adherence to Tyler's framework was found to be mixed. More "Y" indications were obtained from this observation than from the respondent or document review findings.

On Tyler's important first question concerning aims, purposes, goals, and objectives, the evidence yielded no indication. They were not communicated to the learners. However, the objectives of the session's concept, "Quality Circles (QC)" were specified. Quality Circles "will be the means for promoting personal development, developing a problem-solving attitude, encouraging participation by all employees, and enhancing the company's ability to be a leader in the field," it was stated.

The learning objectives of the workshop were implied rather than specified. For example, discussions ensued on the importance of the participants' a) appreciation of the QC concept in the company; b) roles in encouraging subordinates to initate or expand QC involvement; and c) exposure to the same dynamics, process, and concerns as subordinates.

The participants brainstormed a problem considered by the co-trainers to be generic to the firm's shop operation through two separate and realistic QC circles. The process of QC problem-solving in this simulation appeared to be an implied objective. The objectives were related to the content of the workshop in the form of commitment and application by the participants.

Some evidence for the use of outside material was observed. For example, a "T-P [Trainer-Participant] Leadership Questionnaire," which was said to have been secured from a professional consulting firm, was distributed for the participants to complete. The completed forms were designed to profile leadership styles, prompt individual readiness to endorse the QC concept, and diffuse the concept throughout the company.

The company's philosophy and norms regarding QC were enunciated. However, no indication was observed on how Subject-Matter Experts had been requested to provide input or how other sources had been utilized. Individual differences among the learners were accommodated by the co-trainers' frequent encouragements to apply the learning in the participants' organizations.

The remaining items that were reviewed were uncertain to the researcher in relation to Tyler's first question.

The second question, of learning experiences, indicated mostly "Yes" indicators of adherence to the framework. The experiences noted were lecture-discussion, simulation, a 35-mm slide presentation, and class critique. These had been selected for the apparent purposes of conveying company philosophies and norms (lecture-discussion), of exposing the participants to a sample QC process (workshop), of transmitting attitudinal and procedural data (35-mm slide presentation), and of applying and evaluating the training (critique). Approximately 25% of the session was devoted to lecture-discussion, 55% to the workshop simulation, 5% to the 35-mm slide presentation, and 15% to critique and evaluation. The modes of learning had evidently been selected by the program developer and trainer, who co-trained in the session. It was not clear how each mode had been determined.

The learners practiced the behaviors implied by the objectives of the training in several ways. Given that the learning objectives were implied and understood, behaviors were practiced by a) solving a problem that is realistically faced by the participants' subordinates, b) presenting solutions to the recombined group in a manner prescribed by company norms, c) comparing, critiquing, and discussing solutions for improving analytical skills and for experiencing similar concerns, emotions, and techniques of subordinates involved in the QC concept.

The workshop provided ways for participants to apply thinking skills, to acquire information, and to develop interpersonal attitudes through the dynamics of the QC problem-solving method. No learning experiences were observed that appeared to relate to developing career interests or to technical skills and information.

The researcher observed considerable "Y" adherence to Tyler's third step -- the organization of the selected learning experiences. It seemed likely that the sequence of activities in the workshop had been organized though the joint efforts and experience of the two co-trainers.

Continuity and sequencing were in evidence. It was noted that the two principal ways in which continuity and sequencing were to be achieved in the MD programs are by the 1) process of QC problem-solving required by the simulation and 2) statements by the co-trainers to indicate follow-up training for QC facilitators and QC leaders. (Continuity and sequencing for the MD program were not specifically indicated.) A breadth of application approach and description of the QC's concept, philosophy, and norms (followed by analysis) were in evidence. However, no modes of training were observed to teach examples leading to general principles. The organizing structure of the lesson seemed to be the unit of study. None was made evident for the overall MD program.

Regarding evaluation -- the fourth step in Tyler's framework --an admixture of evidence was obtained. It was not made clear how the extent of learning results or behaviors were to be measured. No tangible means were noted (such as reaction questionnaires, results surveys, measurements of increased QC circles resulting from the training, or performance audits) to indicate assessment procedures. No indication was given as to how the total MD program is assessed.

Extensive use was made of discussion and critique. These modes secured participant feedback from the training; they appeared also to secure participant commitment to the QC concept and to encourage diffusion.

The validity of the learning modes and experiences seemed realistic to most participants. The case simulation required the use of a method, a format, and a case that was appropriate for the company. Changes to the training, it was stated, would be made by the co-trainers based on learner comments.

Informal Interviews

Informal conversations with several employees revealed the following opinions regarding the company's management development program:

- **This is a progressive, people-centered company that cares about the employees' well-being, including their educational development.**

- "In order to meet [the effects of] increased competition, we must be more professional in our [management training] approach."

- "Training is hodge-podge, not systematic."

- "Too much emphasis is being put on upper level management [in a] 'train-down' approach . . . . We need more emphasis on the training of younger managers, potential leaders so we can assess and discriminate among [our] training approaches."

CHAPTER V.

RESULTS, CONCLUSIONS, RECOMMENDATIONS

The purpose of this study was to determine the extent to which the training and development program in one medium-to-large United States firm had been developed in accordance with Ralph Tyler's prescribed framework. In this final chapter the results of the case study described in Chapter IV are summarized and discussed. Comments and interpretations are made based on the findings. The study questions that were proposed in the Chapter I are answered.

Results are summarized on the matrix contained in Appendix D as "Y" (yes, adheres to Tyler's framework), "N" (no indication), "?" (questionable to the researcher), or "N/A" (not applicable). These entries are keyed to the interviewing outlines that were designed for the purpose of this study (App. B). In addition, a subjective analysis is made of the results in an attempt to verify patterns and to discover additional patterns that may exist in accordance with the methodology explained in Chapter III. Recommendations are made on the need for further research concerning MD development in general and on the studied firm's program in particular.

The results focused on 1) the training or development purposes that the MD program in the company that was studied seeks to attain, 2) how the learning experiences or modes of training have been selected which help to obtain the objectives, 3) how the learning experiences or modes of training have been organized for effective instruction, and 4) how the effectiveness of learning and of the

MD program is evaluated. The results were obtained from formal interviews, from a training document review, and from the researcher's participation in a company-run training session.

Analysis of Results

In general, the indicators of positive adherence were fewer (97) than the nonindicators (132). Seventy-two (72) "?" (uncertain) indicators of adherence were obtained. More "Y" indicators were recorded in response to Tyler's first two questions than to his last two questions. The first question, which dealt with purpose, yielded mixed results. Findings from the observed training session regarding question three (organization of experiences) ran counter to the overall "no indication" trend and did suggest positive adherence to Tyler's framework.

Findings from the training session were more frequently "yes" than from other sources. Responses from the Curriculum Developer/Program Administrator and from the Staff Manager were largely "yes"; while the findings from the document review and from Participants A and B yielded mostly "no indication." Responses from the two Participants were "N" in like respects. Those from Subject-Matter Experts A and B were somewhat alike.

A subjective analysis of each question was conducted to probe more deeply and to ascertain patterns, as follows:

Question 1. What training or development purposes does the MD program seek to attain?

Responses and findings were somewhat mixed but appeared to indicate more adherence to Tyler's first question than did the results from questions three (organization) and four (evaluation). They indicated less adherence than did the findings from question two (selection). The observed training session yielded few answers of "yes" to question one.

On closer look the apparently positive indicators to question one showed discrepancies in the wording of aims, purpose, goals, and objectives of the MD program. Wording was markedly diverse, indicating disagreement on the program's aims, purposes, goals, and objectives. The Curriculum Developer was able to enunciate the content of these features most easily, followed by the Staff Manager. The two Subject-Matter Experts provided the fewest responses to question one. Summary responses to the question on purposes, goals, and objectives are listed below:

- knowledgeable, participating management staff . . . qualified, productive work force . . . to inject order . . . to continue to develop a tape library . . . to manage time. (Curriculum Developer)

- to develop middle management to progress higher [in the hierarchy] and to qualify our entry level people for higher jobs. (Subject-Matter Expert A)

- to make managers more aware of the process of managing themselves -self-awareness- so they might manage other people . . . [to foster] a well-managed profitable company. (Subject-Matter Expert B)

- to better enable managers to supervise their employees . . . [to] better educate our supervisors . . . improve our productivity . . . enhance our involvement in community affairs . . . make a fair profit . . . . (Participant A)

- to develop people to become good supervisors . . . to become aware of people, their needs, their problems and [to] manage to get the job done through people. (Participant B)

- the identification of long-term potential successors to top management . . . of their needs, the enhancement of some of their 'people' skills and personal needs . . . cross-training . . . continual reassessment of our need to fill vacated positions in lieu of succession. (Staff Manager)

Only those responses relating in some way to people skills and to some extent to motivation or profitability did recur. Findings from the document review and from the observed training session were inconsistent with each other and also with the findings from the respondents.

Answers to the questions on specific learning objectives were discrepant. Those from Participant B were given from the standpoint of the learner ("know the process of budgeting; read financial statements"). Those from the Staff Manager were given from the standpoint of the company ("treat people like decent human beings; provide them with security; afford a productive, loving attitude toward employees"). Responses from the Curriculum Developer, two Subject-Matter Experts, and Participant A were unclear or nonspecific, although they did relate in some way to the evaluation of subordinates or to the handling of typical business problems. The objectives that were noted by the researcher in the company's training session were implied objectives rather than specified objectives (i.e., appreciation of the QC concept; encouraging subordinates to initiate or expand QC involvement; exposure to the same dynamics, process, and concerns as subordinates). Learning objectives were not observed from the training document review, except for several relating to specific seminars. No learning objectives for the overall MD program were observed from the review.

The issues of how targeted behaviors pertain to the program and to the company's operation and how they are practiced in the training sessions were not indicative of adherence. Although several responses were "yes," they were neither specific nor consistent. "Yes" - classed responses included the following:

- Changes are brought about by "role modeling, repetition and encouragement . . . new behaviors are indicated by "more open communication . . . [by] a lessening of tensions . . . [by] succession planning." (Curriculum Developer)

- Behavior changes relate "directly to strategic planning." (Subject-Matter Expert A)

- Behaviors relate to content only through "personally set goals." (Subject-Matter Expert B)

- Our behaviors are changed "by beginning to apply what we learn and to appreciate and practice results, including attitudes . . . everyone needs a refresher [and to] exchange . . . new ideas and information." (Participant A)

- Behaviors may perhaps be related to the needs and culture of our business as we "understand, motivate, and work with employees [and] as we learn to be fair-minded . . . [They are related to our] making money." (Participant B)

• New behaviors are indicated though the learners' "better understanding of people problems and [demonstrations] on the job of people skills and [effective] supervisory techniques . . . [Related behaviors are that our people are] bright and able." (Staff Manager)

Many responses on learner behavior were "no indication," "uncertain," or "not applicable."

The evidence for the use or for the consideration of use of outside sources of input was relatively positive ("Y"). The Center for Creative Leadership, surrounding colleges and universities and, to some extent, professional sources, all appear to have been at least considered as key sources of input for program development. Only those unknown to the company, or those that are too expensive (Staff Manager), or those that fall victim to "poor timing or scheduling" (Program Developer) are not considered and/or used in program development.

The accommodation of the company norms, philosophy of training or education, psychology of the learner, and recognition of individual learner differences was largely nonexistent according to the findings. Responses that appeared to indicate adherence to Tyler's framework were the following:

• Our company's philosophy of education and the psychology of the learner are accommodated in the training program through "personal interpretation of the content" in organizational terms and through the practice we give in reinforcement, respectively. (Curriculum Developer)

- Cultural norms are addressed through the company's new orientation toward continuing education. (Subject-Matter Expert B)

Individual differences among the learners in the training session were noted only in the form of encouragements by the co-trainers to apply the precepts of quality circles to their home organizations.

Question 2. How are learning experiences or modes of training selected which help attain the objectives?

Responses to this question fell more in the "yes" category. They indicated that learning experiences or modes of training are selected by the Training Manager (Curriculum Developer/Program Administrator) in conjunction with a high-level management decisionmaking team. The Training Manager provides input to the team for such decisions and/or functions as a member of the team, but through no apparent method or process. Some evidence did exist from the training document review to suggest outside sources are also considered in decisions, particularly whenever the outside sources (such as the Center for Creative Leadership) sponsor the training.

The prevalent modes of training were found to be workshop, seminar, and case study. Lecture was frequently mentioned, but not "pure lecture," because it is "not as retainable." (Staff Manager)

Problem-solving in segmented groups or "one-on-one" (Participant A) is the principal way learners are made to practice the behaviors implied by the objectives. Other than problem-solving, learners probably do not practice the behaviors, except "by way of support" from top management. (Staff Manager)

The modes experiences were found to relate in various and sometimes conflicting ways to thinking skills, to acquiring information, to studying interpersonal attitudes and, to a lesser extent, to career interests.

Question 3. How are the learning experiences or modes of training organized for effective instruction?

Few "yes" indications of Tyler's principles of organization were obtained. However, the training session in which the researcher participated was organized in accordance with the framework. According to the respondents, the Training Manager organizes training modes and experiences, although Subject Matter *A* claims it is *he*, in some cases, who does the organizing "based on preconceived needs." No organizing process or method was determined. Other than "trial and error" (Participant *B*), their responses did not indicate a process or method that is used to organize learning. Some evidence suggested approaches are sometimes used relating to breadth of application and description followed by analysis and that continuity may be loosely achieved by having all training funneled through the Training Manager's office. It was not evident through the interviews or document review how the MD program addresses sequencing, the integration of modes on goals and objectives, chronological organization, or experiences in handling examples leading to general principles. The organizing structure of the overall MD program was not apparent from the findings.

Question 4. How is the effectiveness of learning and of the MD program evaluated?

Participant feedback, subjective "one-on-one" discussions, and top management "impressions" were observed to be the "methods" used for evaluating program effectiveness. No formal measurement system or instrument was found to apply. In the training session observed by the researcher, extensive use was made of discussion and critique.

Changes to the program were found to be made by top management consensus using participant feedback, that feedback having been channeled through the Training Manager's office. Informal discussions and "trial and error" (Participant B) again applied.

Comments and Interpretations

The researcher interpreted the results of the study by placing them within the context of the curriculum literature as reviewed in Chapter II.

As pointed out in the review, authors and practitioners recognize the importance of training and development in American business. Whether planned or unplanned, management development takes place in virtually all business organizations as a truly needed operation. MD programs have indeed been accorded widespread attention across the business sector.

Despite the need and despite the attention, many firms appear to be paying lip service to the systematic development of MD programs. Many prefer to oppose sound advice, employ ad hoc means, and merely approximate the formulation of aims and techniques that purport to be the essence of effective training. It is the rare company that applies an accurate, systematic diagnosis of organizational and learner needs with a clear vision "to foresee future implications of current [curricular] decisions" (Lewis, 1980). Many observers sense the cost in lost MD efficiencies is staggering.

In this study the researcher has come to appreciate the sense of unity that a systematic approach can bring out of the diversity found among MD circles. Program inconsistencies have too often been linked to the fads and fancies billed as "state-of-the-art training" and compounded by the spiraling bytes of data that executives are expected to absorb in this age of information. Knowledge is becoming evermore difficult to acquire.

It is no secret that business changes are occurring rapidly in our society. Technological change has been so rapid that aspiring managers fresh out of school are finding it strenuous - and sometimes impossible - to cope with all the knowledge they need in order to operate in a complex environment. With so much data at stake, it is falling upon such supplemental programs as management development to contribute order and meaning to at least some of the learning needs being felt by young managers. Against this backdrop, we must acknowledge the prescriptions from the literature to suggest that the real essence of training development is the careful identification of organizational and individual needs couched in very systematic procedures. Needs should be aligned with the mission of the company to be of value to both learner and organization.

The embodiment of the systematic approach to training and development is the four-question framework prescribed by Ralph Tyler (1949). Although some critics have called the effort sterile and inflexible, the framework remains the one curricular tool that can be applied broadly as an industrial model. It helps to prescribe form, function, and content for an MD program in a problem-solving format that matches training to the culture of the business and synchronizes learning to the company mission in measurable terms. Tyler's framework provides a basis for testing, for evaluation, and for adjustment and can improve on existing practice because of its power to avoid repetitive cycles of trial and error.

This case study has illustrated the importance of an accurate diagnosis leading to clearly formulated goals and objectives as the crucial first step from which other steps in MD development must proceed. Studies of the learners, studies of business life (such as market conditions or production capacities), and applications of a firm's training philosophy, cultural norms, and business requirements, are all found within this concept of diagnosis. For maximum learner comprehension, an MD program should be organized with continuity, sequence, and integration of parts.

The company that was the subject in the study has made strides in some of these directions. Stated goals and objectives for its program are evident; learning modes and experiences are administered centrally; some form of assessment is applied. Little doubt exists as to the company's employee-mindedness. The firm does encourage feedback, discussion, and critique in most phases of the program; it tries to provide the best, most satisfying training made possible by its resources and consistent with its self-image as a good community citizen. It uses--or at least considers for use--all relevant outside sources for training such as the Center for Creative Leadership in Greensboro, N.C., as well as some inside sources. The Training Manager has surveyed company personnel to identify individual needs and preferences in training development and appears to focus at least as much attention on employee-related themes as on the bottom line.

Discrepancies in the program have been found relating to the problems of goal clarification, discrepancies not unlike those found in the literature. The practice of development seems not to follow good intent, notwithstanding interest by solid cadre. One possible reason for this difference is the company's youth and inexperience in training and development--about four years. It could be the significant factor that is stalling the company's efforts toward more systematic, behaviorally based training. The company's MD program has been developed and continues to be developed through trial, error, participant feedback, discussions, and impressions. Although necessary in themselves, these "methods" are insufficient for the company to eschew the accretive and episodic training that is detracting from the proud focus on its employees.

Goals and objectives have been stated for the program. Yet on closer look, it is not certain just <u>what</u> these goals and objectives are. The company's first step in program development - setting objectives--suffers from disagreement among the respondents on the <u>content</u> of MD goals and objectives. This suggests that goals and objectives have not been formulated clearly or systematically, and/or communicated to the target audience. Indeed, only the Program Developer and Staff Manager were able to articulate well in this regard - the two principals intimately involved in program development - and they, too, were not able to link goals and objectives to the company's mission, if, in fact, a mission had been stated. It appears the first step in the firm's MD program development - diagnosis - is in a very early state of refinement.

As a probable consequence, the company's selection of learning modes and experiences has not been based or tested in terms of a systematic philosophy or theory of education to which the company should subscribe. The selection of the modes-lecture/discussion, seminar, and case study-is, in the words of Brameld (1971), <u>eclectic</u>; i.e., "a smattering of many things without [discernible] purpose or design" (pp 59, 62). But on a positive note, the training session that was observed by the researcher did offer indication that the systematic design of training can occur and is perhaps beginning to occur.

The modes of training were not organized for maximum effect in this program. Serious questions are raised on the program's attention to continuity, sequence, and integration, although continuity has been achieved somewhat through the Training Manager's centralized control of training. (Continuity, sequence, and integration are Tyler's prescribed organizing principles.) The lack of these principles, coupled with uncertain program objectives, could help to explain why learners have not been made to practice behaviors implied by program objectives and/or why responses on behaviors did not relate specifically to the questions during the interviews.

Study Questions Answered. The introduction to this study (Chapter I) posed the following questions that are now answered:

1) **Is a systematic approach for management training development prescribed over random and other possible approaches?**

2) **Which, if any, framework is a prime example of the approach?**

3) **To what extent has that framework been applied in the management training program of the company examined in this study?**

4) **What recommendations can be made in light of this study?**

- Question 1 -

Is a systematic approach for management training development prescribed over random and other possible approaches?

A systematic approach is strongly endorsed for training development. The approach assumes the form of an open model that admits outside input; for example, information from outside training agencies.

The approach is recommended in a problem-solving format. Such an approach should isolate the training problem, identify options and resources, and select relevant activities. It should include 1) the orderly diagnosis of organizational and individual learning needs, 2) the articulation of clear and achievable learning goals and objectives, 3) the selection and organization of training modes and experiences, 4) and the allowance for program adjustment based on the assessment of learning achievement and effectiveness of training modes vis-a-vis the goals and objectives.

Other possible approaches have been identified as curricula relating to human interactions in the classroom setting; educational valuing of the content based on personal or institutional preference, and such reactive modes as ad hoc, accretive, episodic, and fad-bound training.

- Question 2 -

Which, if any, framework is a prime example of the approach?

The framework developed by Ralph Tyler is **the** prime example of a systematic approach to training development. The framework outlines curricular function, organizing principles, and organizing structure in a linear, four-step sequence. It is regarded as a paradigm in the field and considered most responsive to perceived learning problems.

Tyler's framework is recognized in the fields of education and business administration to account for the three key critical problem-solving steps needed for systematic MD development; viz.:

1) an accurate **diagnosis** of organizational and individual skill deficiencies;
2) the identification of suitable **activities** or modes of training which might serve to correct imbalances or mistakes in deficiencies as organizational goals and needs;

3) **evaluation.**

Tyler's four-question framework which developers are advised to think through and answer in MD terms is, once again:

1) **What organizational purposes and training or development purposes does the MD program seek to attain?**

2) **How are learning experiences or modes of training selected which help attain the objectives?**

3) **How are the learning experiences or modes of training organized for effective instruction?**

4) **How is the effectiveness of learning and of the MD program evaluated?**

- Question 3 -

To what extent has that framework been applied in the management training program of the company examined in this study?

The degree of adherence is slight. The firm examined was found to be striving toward systematic development but does have far to go in order to follow all of Tyler's prescriptions. Some diagnosis of needs had taken place in the form of two surveys, with the returns neatly grouped into categories labeled "Top Management," "Middle Management," and "1st Level." Yet it was not clear whether these were performance needs or training needs and whether they were organizational or individual needs. The returns were exclusively perceptual; no accommodation has been made for behavior change as a function of learning. The company's diagnosis was, therefore, incomplete.

Goals and objectives are present after a fashion. These proceeded from employee perceptions of the MD program rather than from stated formulations. The matter of having learners practice behaviors implied by the objectives is highly suspect.

The company's use of inside and especially outside sources of input was found to be in accordance with the framework. The selection of learning modes and objectives has been centralized through the Training Manager's office and was also found to be in accordance. However, the organization of training modes and experiences was not achieved systematically through sequence or integration, albeit with some continuity.

The extent to which the program's evaluation procedures were developed in accordance with the framework appears slight. Only subjective means have thus far been used and only to assess participant reactions, not achievement.

- Question 4 -

What recommendations can be made in light of this study?

Comments and interpretations have earlier been made. These pertained to the firm's interest and vigor in striving toward the best possible training for its employees and also to its youth and inexperience in effecting full systematic development. Specific recommendations regarding the firm's MD program follow in the last section of this study.

Recommendations

This study should be considered exploratory. The findings suggest that further research is needed in management development programs in general and this firm's program in particular.

MD Programs in general. Additional research is necessary to determine why and under what conditions a systematic approach using Tyler's framework might not be followed. Inquiry is needed as to what other modes or techniques are in use but perhaps not being reported in the literature. Studies to discover the dollar value of systematic MD development in relation to an organization's bottom line and those to measure the efficiencies that may be lost through non systematic development should also be undertaken. [As of 1967 only seven percent of American firms providing for training and development subsidies (tuition-aid) have studied their training programs to determine impact.]

Little social science research has been done on the effectiveness of MD programs. What has been conducted "has generally been inconclusive or negative [relating to training in human relations and its impact on supervisory behavior]. Further research should examine personal and situational variables as they interact with the effects of training and development" (French, p. 419; Mann, 1957, pp 153-157), on the impact, for example, that systematic development might have on employee attitudes or productivity, with the assumption that employees have been led to feel their companies' serious, systematic interest in the employees' educational well-being.

MD Program in this study. The company examined in this study is advised to revisit its management development program, using Tyler's four-step framework. It should pay special attention to those segments found not to be in accord with the framework. It should analyze the constraints of time, content, target populations, culture, and structure in an attempt to isolate the effects such elements will have on program redevelopment.

As a crucial first step, management should clarify the corporate mission and goals. These were not found in a review of company documents. Once the mission is made clear, the firm should undertake a thorough, systematic analysis of performance needs, both organizational and individual, and translate these performance needs into behaviorally-based training needs. It should screen the training needs through the identified constraints and cultural limitations, then formulate tentative MD program goals and objectives.

The company should survey all the organizations involved in training in order to secure understanding and commitment to the program and to refine the tentative goals and objectives. The refined goals and objectives should be communicated clearly throughout the company as a function of the corporate mission.

The company should focus learner behavior on MD goals and objectives and avoid such nontraining goals in the company as the identification of management succession. The focus may well help learners to obtain relevant, efficient training and to know it.

Three levels of analysis should be included in the company's diagnosis (Rummler, 1976):

Level I (Policy)	The structure and goals of the company and the kind of environment it provides for the job.	**Company** norms and culture addressed
Level II (Strategy)	The theory and accomplishments of a job itself and how it helps fulfill the goals of the organizations.	**Organizational** differences addressed
Level III (Tactics)	The kinds of changes that must be made in the behavior of individuals if they are to accomplish the job.	**Individual** learner needs addressed

A study of each job situation or occasion to perform should be made. A study of the performer, the behaviors (actions or decisions) that are to occur, and the consequences of those behaviors, should be included (p. 14-1).

The company should clarify standards for training. Two questions may be explored to this effect:

1. What is the desired performance (job outcome)?

- What are the job standards?
- Who says that these are standards?
- Does everybody agree on these standards?
- Does everybody (anybody) know whether these standards are now being met?

2. **What are specific differences between actual and expected performance?**

- Has anyone ever performed as required?
- Who?
- When?

(Rebedeau and Tagliere, 1976, p. 26-14).

Since the firm does make extensive use of the group process and employee feedback, it would do well to exploit the use of this process to develop more performance-based training

> that focuses specifically on what trainees need to know to perform effectively on the job. [This can give employees] a sense of ownership in the final product [and enable them to] see the training department as responsive to their needs . . . . As we're using the term, 'group process' means simply that [the company] enlists the aid of people who know how to do the jobs you're [training for], potential trainees, and their managers in the design of the training curriculum (McKenna et al., 1984, p. 77)

Data should be collected from top management on corporate mission, goals, and objectives. Training guidance should come both from top management and from the users in the form of such established group processes as the Quality Circle Awareness program.

The targeted behaviors of the learners in relation to the needs and culture of the company are not clearly understood through the MD program. This shortcoming deserves attention using Tyler's five principles below:

1. The learner should have experiences that provide opportunity to practice the behaviors implied by the objective.

2. The learner should receive satisfaction from behaviors implied by the objective.

3. Reactions desired in the experiences should be within the range of possibility for the students involved.

4. Several experiences can be used to attain the same objectives.

5. The same experiences will usually bring about several outcomes.

How, specifically, are targeted behaviors to be determined through this program? The answer rests with the identification of company performance needs, skills, and deficiencies. Rummler commented on how a diagnosis will help to determine why and whether a particular behavior

> really makes a difference; that is, is there any value in improving that particular behavior, or could the time and energy be better spent correcting other behaviors? [The diagnosis] tells us something about what is important (or should be important) to the organization and therefore is most likely to receive positive consequences from all levels of management. For example, in the private sector, profits are the ultimate consequences at all levels. Behavior which cannot be observed to contribute to profits or other economic measures will not be supported. Also, there is frequently a conflict between levels or subsystems centered around economic measures, and once this comes to light, a number of problems and deficiences are often explained (pp. 14-15).

Once goals and objectives for the program have been clearly formulated, every course, seminar, workshop, etc., and its modes of training or learning experiences should be designed to focus on those goals and objectives. This should be accomplished by the formulation of course-specific goals and objectives that relate to and proceed from the MD program's overall goals and objectives.

Continuity, sequencing, and integration of all learning might be more easily achieved as a consequence of this intense focus. Program changes would be more valid because relevant behaviors and specific objectives, not perceptions, would be assessed. An evaluation form listing MD behaviors and objectives should be devised in an attempt to assess behavior change relative to the objectives.

The recommendations above are sequenced below in terms of sample wording that may be adaptable for this company:

1. Clarify Company Mission and Goal.

   To produce and supply on a timely basis metals and related machine, stone, clay, and glass products to customers in the southeastern part of the United States at a fair profit.

   The goal of the company is to earn ____________________ annually from sales at least equal to __________________ annually at a ____% return on investment.

2. Identify Performance Needs.

Organizational needs include those to produce and deliver efficiently metals and related machine, stone, clay, and glass products and to develop accurate sales forecasts and production schedules that will increase the company's return on investment to _____% annually.

Individual needs include those to manage and/or supervise employees effectively in the production and delivery of metals and related machine, stone, clay, and glass products and to develop and apply sales forecasts and production schedules to increase the return on investment to ____% annually.

3. Identify Training Needs.

Organizational needs are those to produce metals and relate machine and stone products in a manner as efficiently as in the production of clay and glass and to effect level production over a 12-month period.

Individual needs are to manage or supervise effectively those employees involved in the production of metals and related machine and stone products through an operational awareness of human resource management and to effect level production through material resource planning.

4. Set MD Program Goal and Objectives.

The goal is for the learner to gain an operational awareness of human resource management and material resource planning as they impact on productivity.

On completion of the MD program, the learner will be able to:

a) apply skills in business and interpersonal communication;

b) appreciate the need for and concept of 'group process';

c) integrate and apply the activities of distribution requirements planning, production programming, master production scheduling, and capacity requirements planning.

5. Select Relevant Activities.

The inside and outside sources of input should continue to be used.

6. Organize the Activities.

The sequencing of modes is important for learner retention. For example, training in individual communication skills should occur before training in a group process. Training in master production scheduling may be more effective if conducted before training in production programming.

7. Relate Each Course to Total Program.

The current Quality Awareness training should be presented as an aspect or objective of the overall MD program. (See 4-b above.)

Every course, seminar, etc. should be similarly addressed, either as a specified or as an implied MD objective, so learners can understand the need for given training in the broader perspective and the relationship of a particular course to the overall program.

8. Construct Assessment Instrument.

A form or method should be devised to measure the extent to which each learning objective has been achieved by a learner. In addition to observation, performance reviews should be used to assess behaviors relating to learning achievement, if this is allowed by company policy.

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APPENDIX A

AN INTERPRETATION OF THE TYLER RATIONALE

1. **ENDS:** What educational purposes should the school seek to attain?
   - 1.1 Sources of objectives:
     - 1.11 studies of learners
     - 1.12 studies of contemporary life outside school (setting)
     - 1.13 suggestions from subject specialists
     - 1.14 the use of philosophy
     - 1.15 the use of a psychology of learning
   - 1.2 the form stating objectives:
     - 1.21 "Since the real purpose of education is not to have the instructor perform certain activities but to bring about significant changes in the students' patterns of behavior, it becomes important to recognize that any statement of the objectives of the school (setting) should be a statement of changes to take place in students." (Tyler, p. 44)
     - 1.22 "The most useful form for stating objectives is to express them in terms which identify both the kind of behavior to be developed in the student and the content or area of life in which this behavior is to operate." (p. 46)

2. **MEANS:**
   - 2.1 How can learning experiences be selected which are likely to be useful in attaining these objectives?
     - 2.11 General principles in selecting learning experiences:
       - 2.111 student must have experiences that afford opportunity to practice the behavior implied by the objective
       - 2.112 student should receive satisfaction from such behavior
       - 2.113 many experiences can lead to same objectives
       - 2.114 these experiences will lead to several outcomes
     - 2.12 Kinds of learning experiences:
       - 2.121 thinking skills
       - 2.122 acquiring information
       - 2.123 developing social attitudes
       - 2.124 developing interests
   - 2.2 How can learning experiences be organized for effective instruction?
     - 2.21 criteria for effective organization
       - 2.211 continuity
       - 2.212 sequence
       - 2.213 integration
     - 2.22 organizing principles:
       - 2.221 chronological
       - 2.222 breadth of application
       - 2.223 description followed by analysis
       - 2.224 examples (concrete) to general principles
     - 2.23 organizing structures:
       - 2.231 specific subjects
       - 2.232 broad fields
       - 2.233 core curriculum
       - 2.234 unit of study
   - 2.3 How can the effectiveness of learning experiences be evaluated?
     - 2.31 Evaluation is "the process for finding out how far the learning experiences as developed and organized are actually producing the desired results and the process of evaluation will involve identifying the strengths and weaknesses of the plans." (p. 105)

APPENDIX B

INTERVIEWING OUTLINE

FOR CASE STUDY

IN THE

APPLICATION OF TYLER'S FRAMEWORK

- CURRICULUM DEVELOPER/ PROGRAM ADMINISTRATOR -

BASIC COMPANY DATA

1. Company name (or pseudonym to be used) ____________________
2. Type of business ____________________
3. Product/or service ____________________
4. Number of employees ____________________
5. Dollar volume of business annually ____________________
6. Annual % growth in volume ____________________
7. Length of time in business ____________________
8. Division/organization ____________________
9. Location ____________________
10. Number of years in operation ____________________
11. Number of employees ____________________
12. Number of management employees (i.e., exempt) ____________________

*13. Employee status ____________________

14. Number of management levels ____________________
15. Targeted levels for mgmt. training/develop program ____________________
16. Targeted number of managers for program ____________________
17. Number of mgmt. training/develop company locations ____________________
18. Number of non-company locations ____________________
19. Types of non-company locations ____________________
    (university, conference center, etc.)

*Discarded after pilot study.

Tyler's Question Number 1

WHAT EDUCATIONAL PURPOSES SHOULD THE SCHOOL SEEK TO ATTAIN?

- Reformulated Question -

WHAT TRAINING OR DEVELOPMENT PURPOSES DOES THE MD PROGRAM SEEK TO ATTAIN?

A. What are the aims and purposes of the program?
(Samples/Illustrations?)

B. What are the goals?
(Samples/Illustrations?)

C. What are the specific learning objectives?
(Samples/Illustrations?)

D. How are significant changes to be brought about in the learners' patterns of behavior?

*E. What and how are new behaviors to be indicated?
** What and how are new behaviors to be indicated early in the program?

*F. What related behaviors were assumed?
** What related behaviors were assumed before the training?

G. What levels/ranks are the learners?

H. In what respects are the targeted behaviors related and unrelated to the content of the MD program?

I. In what ways are the targeted behaviors related and unrelated to the needs and culture of the business?

J. What are the sources of input for the program that are external to the program and to the company?
(Samples/Illustrations)

K. Specifically, how are these external sources considered and applied in the program's development?
(Samples/Illustrations)

L. What external sources are not considered and/or utilized? Why not?

*Original question before pilot study.
**Adjusted question after pilot study.

M. In what specific ways are suggestions from subject specialists (subject matter experts) applied in program development?
(Samples/Illustrations)

N. How are the subject specialists requested to provide input? To what extent are they sourced?
(Samples/Illustrations?)

O. In what ways are their suggestions <u>not</u> considered and/or applied? Why not?

P. In what specific ways is the company's "philosophy" of training or education considered and/or utilized in program development? How are the company's cultural norms addressed?
(Samples/Illustrations?)

Q. What are the other sources of input used to develop the MD program? How, specifically, are the data incorporated?
(Samples/Illustrations?)

R. In what ways is the psychology of the learner (educational psychology) applied in program development?

S. How are individual differences among the learners accommodated in program development? How are they not?

Tyler's Question Number 2

HOW CAN LEARNING EXPERIENCES BE SELECTED WHICH ARE LIKELY TO BE USEFUL IN ATTAINING THESE OBJECTIVES?

- Reformulated Question -

HOW ARE LEARNING EXPERIENCES OR MODES OF TRAINING SELECTED WHICH HELP ATTAIN THE OBJECTIVES?

A. What are the learning experiences or modes (lecture, workshop, self-paced booklet, outside course, etc.)?
(Samples/Illustrations?)

B. What is the % use of each?
(Samples/Illustrations?)

C. Who selects each mode?
(Samples/Illustrations?)

D. Specifically, how is each selected?

E. Which modes/experiences are not used? Why not?

F. How do the learners practice the behaviors implied by the objectives?
(Samples/Illustrations?)

G. How do the modes/experiences relate to:
(Samples/Illustrations?)

a. thinking skills?
b. acquiring information?
c. developing interpersonal attitudes?
d. developing (career) interests?
e. technical skills and information?

Tyler's Question Number 3

HOW CAN LEARNING EXPERIENCES BE ORGANIZED FOR EFFECTIVE INSTRUCTION?

- Reformulated Question -

HOW ARE THE LEARNING EXPERIENCES OR MODES OF TRAINING ORGANIZED FOR EFFECTIVE INSTRUCTION?

A. Who organizes the experiences/modes?
(Samples/Illustrations?)

B. What method or process is used? How?
(Samples/Illustrations?)

*C. How is continuity achieved?
** How is continuity linking all the courses, seminars, etc. to a common purpose achieved?
(Samples/Illustrations?)

*D. How is sequencing accomplished?
** How is sequencing (i.e., one course necessarily following another) accomplished?
(Samples/Illustrations?)

E. How are the experiences/modes integrated to focus on the goals and objectives?
(Samples/Illustrations?)

F. In what ways are the experiences/modes organized chronologically?
(Samples/Illustrations?)

*G. What experiences/modes use a breadth of application approach?
** What experiences/modes use an approach called breadth of application (i.e., principle to widespread application)?
(Samples/Illustrations?)

*H. Which experiences/modes use description followed by analysis?
** Which experiences/modes use description followed by analysis as in a case study?
(Samples/Illustrations?)

I. Which experiences/modes use examples (concrete) to general principles?
(Samples/Illustrations?)

J. What (and how achieved) is the organizing structure of the MD program?
(Samples/Illustrations?)

(a. specific subjects)
(b. core curriculum)
(c. broad fields)
(d. unit of study)

*Original question before pilot study.
**Adjusted question after pilot study.

Tyler's Question Number 4

HOW CAN THE EFFECTIVENESS OF LEARNING EXPERIENCES BE EVALUATED?

- Reformulated Question -

HOW IS THE EFFECTIVENESS OF LEARNING AND OF THE MD PROGRAM EVALUATED?

A. How is the extent of learning measured in each participant?
(Samples/Illustrations?)

*B. How are desired learning results measured?
** How are desired learning results later measured?
(Samples/Illustrations)

*C. How are behaviors measured?
** How are behaviors measured on the job?
(Samples/Illustrations?)

D. How are the goals and objectives later assessed for possible reformulation?
(Samples/Illustrations?)

E. How is the validity of learning experiences/modes assessed?
(Samples/Illustrations?)

F. How is the overall MD program evaluated?
(Samples/Illustrations?)

G. How are MD program changes made? Who makes them and why?
(Samples/Illustrations?)

*Original question before pilot study.
**Adjusted question after pilot study.

5. ANYTHING ELSE YOU WOULD LIKE TO ADD?
(Samples/Illustrations?)

INTERVIEWING OUTLINE

FOR CASE STUDY

IN THE

APPLICATION OF TYLER'S FRAMEWORK

- SUBJECT MATTER EXPERT -

BASIC COMPANY DATA

1. Company name (or pseudonym to be used) ______________
2. Type of business ______________
3. Product/or service ______________
4. Number of employees ______________
5. Dollar volume of business annually ______________
6. Annual % growth in volume ______________
7. Length of time in business ______________
8. Division/organization ______________
9. Location ______________
10. Number of years in operation ______________
11. Number of employees ______________
12. Number of management employees (i.e., exempt) ______________

*13. Employee status ______________

14. Number of management levels ______________
15. Targeted levels for mgmt. training/develop program ______________
16. Targeted number of managers for program ______________
17. Number of mgmt. training/develop company locations ______________
18. Number of non-company locations ______________
19. Types of non-company locations ______________
    (university, conference center, etc.)

*Discarded after pilot study.

Tyler's Question Number 1

WHAT EDUCATIONAL PURPOSES SHOULD THE SCHOOL SEEK TO ATTAIN?

- Reformulated Question -

WHAT TRAINING OR DEVELOPMENT PURPOSES DOES THE MD PROGRAM SEEK TO ATTAIN?

A. What are the aims and purposes of the program?
(Samples/Illustrations?)

B. What are the goals?
(Samples/Illustrations?)

C. What are the specific learning objectives?
(Samples/Illustrations?)

D. (Deleted)

E. (Deleted)

F. (Deleted)

G. (Deleted)

H. In what respects are the targeted behaviors related and unrelated to the content of the MD program?

I. In what ways are the targeted behaviors related and unrelated to the needs and culture of the business?

J. (Deleted)

K. (Deleted)

L. (Deleted)

M. In what specific ways are your suggestions as a subject matter expert applied in program development?
(Samples/Illustrations)

N. How are you requested to provide input? To what extent are you sourced?
(Samples/Illustrations?)

O. In what ways are your suggestions <u>not</u> considered and/or applied?

P. How are the company's cultural norms addressed?
(Samples/Illustrations?)

Q. What are the other sources of input used to develop the MD program? How, specifically, are the data incorporated?
(Samples/Illustrations?)

R. (Deleted)

S. (Deleted)

Tyler's Question Number 2

HOW CAN LEARNING EXPERIENCES BE SELECTED WHICH ARE LIKELY TO BE USEFUL IN ATTAINING THESE OBJECTIVES?

- Reformulated Question -

HOW ARE LEARNING EXPERIENCES OR MODES OF TRAINING SELECTED WHICH HELP ATTAIN THE OBJECTIVES?

A. What are the learning experiences or modes (lecture, workshop, self-paced booklet, outside course, etc.)?
(Samples/Illustrations?)

B. What is the % use of each?
(Samples/Illustrations?)

C. Who selects each mode?
(Samples/Illustrations?)

D. Specifically, how is each selected?

E. Which modes/experiences are <u>not</u> used? Why not?

F. How do the learners practice the behaviors implied by the objectives?
(Samples/Illustrations?)

G. How do the modes/experiences relate to:
(Samples/Illustrations?)

a. thinking skills?
b. acquiring information?
c. developing interpersonal attitudes?
d. developing (career) interests?
e. technical skills and information?

Tyler's Question Number 3

HOW CAN LEARNING EXPERIENCES BE ORGANIZED FOR EFFECTIVE INSTRUCTION?

- Reformulated Question -

HOW ARE THE LEARNING EXPERIENCES OR MODES OF TRAINING ORGANIZED FOR EFFECTIVE INSTRUCTION?

A. Who organizes the experiences/modes?
(Samples/Illustrations?)

B. What method or process is used? How?
(Samples/Illustrations?)

C. How is continuity achieved?
(Samples/Illustrations?)

D. How is sequencing accomplished?
(Samples/Illustrations?)

E. How are the experiences/modes integrated to focus on the goals and objectives?
(Samples/Illustrations?)

F. In what ways are the experiences/modes organized chronologically?
(Samples/Illustrations?)

*G. What experiences/modes use a breadth of application approach?
** What experiences/modes use a breadth of application approach like principle to widespread application?
(Samples/Illustrations?)

*H. Which experiences/modes use description followed by analysis?
** Which experiences/modes use description followed by analysis like the case study?
(Samples/Illustrations?)

I. Which experiences/modes use examples (concrete) to general principles?
(Samples/Illustrations?)

J. (Deleted)

*Original question before pilot study.
**Adjusted question after pilot study.

Tyler's Question Number 4

HOW CAN THE EFFECTIVENESS OF LEARNING EXPERIENCES BE EVALUATED?

- Reformulated Question -

HOW IS THE EFFECTIVENESS OF LEARNING AND OF THE MD PROGRAM EVALUATED?

A. How is the extent of learning measured in each participant?
(Samples/Illustrations?)

B. How are desired results measured?
(Samples/Illustrations)

C. How are behaviors measured?
(Samples/Illustrations?)

D. How are the goals and objectives later assessed for possible reformulation?
(Samples/Illustrations?)

E. How is the validity of learning experiences/modes assessed?
(Samples/Illustrations?)

F. How is the overall MD program evaluated?
(Samples/Illustrations?)

G. How are MD program changes made? Who makes them and why?
(Samples/Illustrations?)

5. ANYTHING ELSE YOU WOULD LIKE TO ADD?
(Samples/Illustrations?)

INTERVIEWING OUTLINE

FOR CASE STUDY

IN THE

APPLICATION OF TYLER'S FRAMEWORK

- PARTICIPANT -

BASIC COMPANY DATA

1. Company name (or pseudonym to be used) ______________________________
2. Type of business ______________________________
3. Product/or service ______________________________
4. Number of employees ______________________________
5. Dollar volume of business annually ______________________________
6. Annual % growth in volume ______________________________
7. Length of time in business ______________________________
8. Division/organization ______________________________
9. Location ______________________________
10. Number of years in operation ______________________________
11. Number of employees ______________________________
12. Number of management employees (i.e., exempt) ______________________________

*13. Employee status ______________________________

14. Number of management levels ______________________________
15. Targeted levels for mgmt. training/develop program ______________________________
16. Targeted number of managers for program ______________________________
17. Number of mgmt. training/develop company locations ______________________________
18. Number of non-company locations ______________________________
19. Types of non-company locations ______________________________
    (university, conference center, etc.)

*Discarded after pilot study.

Tyler's Question Number 1

WHAT EDUCATIONAL PURPOSES SHOULD THE SCHOOL SEEK TO ATTAIN?

- Reformulated Question -

WHAT TRAINING OR DEVELOPMENT PURPOSES DOES THE MD PROGRAM SEEK TO ATTAIN? WHAT PURPOSES OF 2-3 RECENT COURSES (SEMINAR, WORKSHOPS, ETC.)?

A. What are the aims and purposes of the program?
(Samples/Illustrations?)

B. What are the goals?
(Samples/Illustrations?)

C. What are the specific learning objectives?
(Samples/Illustrations?)

D. How are significant changes to be brought about in the learners' patterns of behavior?

E. What new behaviors are indicated?
(Samples/Illustrations?)

F. What related behaviors are assumed before attendance in a course?

G. (Deleted)

H. In what respects are your targeted behaviors related and unrelated to the content of the MD program?

I. In what ways are the targeted behaviors related and unrelated to the needs and culture of the business?

J. (Deleted)

K. (Deleted)

L. (Deleted)

M. (Deleted)

N. (Deleted)

O. (Deleted)

P. In what specific ways is the company's "philosophy" of training or education considered and/or utilized in program development? How are the company's cultural norms addressed? Your organization's? (Samples/Illustrations?)

Q. (Deleted)

R. In what ways is the psychology of the learner (educational psychology) applied in program development?

S. How are individual differences among the learners accommodated in program development? How are they not?

Tyler's Question Number 2

HOW CAN LEARNING EXPERIENCES BE SELECTED WHICH ARE LIKELY TO BE USEFUL IN ATTAINING THESE OBJECTIVES?

- Reformulated Question -

HOW ARE LEARNING EXPERIENCES OR MODES OF TRAINING SELECTED WHICH HELP ATTAIN THE OBJECTIVES?

A. What are the learning experiences or modes (lecture, workshop, self-paced booklet, outside course, etc.)?
(Samples/Illustrations?)

B. What is the % use of each?
(Samples/Illustrations?)

C. Who selects each mode?
(Samples/Illustrations?)

D. Specifically, how is each selected?

E. Which modes/experiences are not used? Why not?

F. How do you practice the behaviors implied by the objectives?
(Samples/Illustrations?)

G. How do the modes/experiences relate to:
(Samples/Illustrations?)

a. thinking skills?
b. acquiring information?
c. developing interpersonal attitudes?
d. developing (career) interests?
e. technical skills and information?

Tyler's Question Number 3

HOW CAN LEARNING EXPERIENCES BE ORGANIZED FOR EFFECTIVE INSTRUCTION?

- Reformulated Question -

HOW ARE THE LEARNING EXPERIENCES OR MODES OF TRAINING ORGANIZED FOR EFFECTIVE INSTRUCTION?

A. Who organizes the experiences/modes?
(Samples/Illustrations?)

B. What method or process is used? How?
(Samples/Illustrations?)

C. How is continuity achieved?
(Samples/Illustrations?)

D. How is sequencing accomplished?
(Samples/Illustrations?)

E. How are the experiences/modes integrated to focus on the goals and objectives?
(Samples/Illustrations?)

F. In what ways are the experiences/modes organized chronologically?
(Samples/Illustrations?)

G. What experiences/modes use a breadth of application approach?
(Samples/Illustrations?)

H. Which experiences/modes use description followed by analysis?
(Samples/Illustrations?)

I. Which experiences/modes use examples (concrete) to general principles?
(Samples/Illustrations?)

J. What (and how achieved) is the organizing structure of the MD program?
(Samples/Illustrations?)

(a. specific subjects)
(b. core curriculum)
(c. broad fields)
(d. unit of study)

Tyler's Question Number 4

HOW CAN THE EFFECTIVENESS OF LEARNING EXPERIENCES BE EVALUATED?

- Reformulated Question -

HOW IS THE EFFECTIVENESS OF LEARNING AND OF THE MD PROGRAM EVALUATED?

A. How is the extent of learning measured in each participant?
(Samples/Illustrations?)

B. How are desired results measured?
(Samples/Illustrations)

C. How are behaviors measured?
(Samples/Illustrations?)

D. How are the goals and objectives later assessed for possible reformulation?
(Samples/Illustrations?)

E. How is the validity of learning experiences/modes assessed?
(Samples/Illustrations?)

F. How is the overall MD program evaluated?
(Samples/Illustrations?)

5. ANYTHING ELSE YOU WOULD LIKE TO ADD?
(Samples/Illustrations?)

INTERVIEWING OUTLINE

FOR CASE STUDY

IN THE

APPLICATION OF TYLER'S FRAMEWORK

- STAFF MANAGER -

BASIC COMPANY DATA

1. Company name (or pseudonym to be used) ____________________
2. Type of business ____________________
3. Product/or service ____________________
4. Number of employees ____________________
5. Dollar volume of business annually ____________________
6. Annual % growth in volume ____________________
7. Length of time in business ____________________
8. Division/organization ____________________
9. Location ____________________
10. Number of years in operation ____________________
11. Number of employees ____________________
12. Number of management employees (i.e., exempt) ____________________
*13. Employee status ____________________
14. Number of management levels ____________________
15. Targeted levels for mgmt. training/develop program ____________________
16. Targeted number of managers for program ____________________
17. Number of mgmt. training/develop company locations ____________________
18. Number of non-company locations ____________________
19. Types of non-company locations ____________________
    (university, conference center, etc.)

*Discarded after pilot study.

Tyler's Question Number 1

WHAT EDUCATIONAL PURPOSES SHOULD THE SCHOOL SEEK TO ATTAIN?

- Reformulated Question -

WHAT TRAINING OR DEVELOPMENT PURPOSES DOES THE MD PROGRAM SEEK TO ATTAIN? WHAT PURPOSES OF 2-3 RECENT COURSES (SEMINARS, WORKSHOPS, ETC.)?

A. What are the aims and purposes of the program?
(Samples/Illustrations?)

B. What are the goals?
(Samples/Illustrations?)

C. What are the specific learning objectives?
(Samples/Illustrations?)

D. How are significant changes to be brought about in the learners' patterns of behavior?

E. What new behaviors are indicated?
(Samples/Illustrations?)

F. What related behaviors are currently assumed?

G. What levels/ranks are the learners?

H. In what respects are the targeted behaviors related and unrelated to the content of the MD program?

I. In what ways are the targeted behaviors related and unrelated to the needs and culture of the business?

J. What are the sources of input for the program that are external to the program and to the company?
(Samples/Illustrations)

K. Specifically, how are these external sources considered and applied in the program's development?
(Samples/Illustrations)

L. What external sources are <u>not</u> considered and/or utilized? Why not?

M. In what specific ways are suggestions from subject specialists (subject matter experts) applied in program development?
(Samples/Illustrations)

N. How are the subject specialists requested to provide input? To what extent are they sourced?
(Samples/Illustrations?)

O. In what ways are their suggestions not considered and/or applied? Why not?

P. (Deleted)

Q. What are the other sources of input used to develop the MD program? How, specifically, are the data incorporated?
(Samples/Illustrations?)

R. (Deleted)

S. How are individual differences among the learners accommodated in program development? How are they not?

Tyler's Question Number 2

HOW CAN LEARNING EXPERIENCES BE SELECTED WHICH ARE LIKELY TO BE USEFUL IN ATTAINING THESE OBJECTIVES?

- Reformulated Question -

HOW ARE LEARNING EXPERIENCES OR MODES OF TRAINING SELECTED WHICH HELP ATTAIN THE OBJECTIVES?

A. What are the learning experiences or modes (lecture, workshop, self-paced booklet, outside course, etc.)?
(Samples/Illustrations?)

B. What is the % use of each?
(Samples/Illustrations?)

C. Who selects each mode?
(Samples/Illustrations?)

D. Specifically, how is each selected?

E. Which modes/experiences are not used? Why not?

F. How do the learners practice the behaviors implied by the objectives?
(Samples/Illustrations?)

G. How do the modes/experiences relate to:
(Samples/Illustrations?)

a. thinking skills?
b. acquiring information?
c. developing interpersonal attitudes?
d. developing (career) interests?
e. technical skills and information?

Tyler's Question Number 3

HOW CAN LEARNING EXPERIENCES BE ORGANIZED FOR EFFECTIVE INSTRUCTION?

- Reformulated Question -

HOW ARE THE LEARNING EXPERIENCES OR MODES OF TRAINING ORGANIZED FOR EFFECTIVE INSTRUCTION?

A. Who organizes the experiences/modes?
(Samples/Illustrations?)

B. What method or process is used? How?
(Samples/Illustrations?)

C. How is continuity achieved?
(Samples/Illustrations?)

D. How is sequencing accomplished?
(Samples/Illustrations?)

E. How are the experiences/modes integrated to focus on the goals and objectives?
(Samples/Illustrations?)

F. In what ways are the experiences/modes organized chronologically?
(Samples/Illustrations?)

G. What experiences/modes use a breadth of application approach?
(Samples/Illustrations?)

H. Which experiences/modes use description followed by analysis?
(Samples/Illustrations?)

I. Which experiences/modes use examples (concrete) to general principles?
(Samples/Illustrations?)

J. (Deleted)

Tyler's Question Number 4

HOW CAN THE EFFECTIVENESS OF LEARNING EXPERIENCES BE EVALUATED?

- Reformulated Question -

HOW IS THE EFFECTIVENESS OF LEARNING AND OF THE MD PROGRAM EVALUATED?

A. How is the extent of learning measured in each participant?
(Samples/Illustrations?)

B. How are desired results on the job measured?
(Samples/Illustrations)

C. How are behaviors measured?
(Samples/Illustrations?)

D. How are the goals and objectives later assessed for possible reformulation?
(Samples/Illustrations?)

E. How is the validity of learning experiences/modes assessed?
(Samples/Illustrations?)

F. How is the overall MD program evaluated?
(Samples/Illustrations?)

G. How are MD program changes made? Who makes them and why?
(Samples/Illustrations?)

5. ANYTHING ELSE YOU WOULD LIKE TO ADD?
(Samples/Illustrations?)

APPENDIX C

- Training Documents Reviewed -

October 8, 1981

MEMO TO: ALL EMPLOYEES

FROM: [redacted] (NAMES)

RE: Organizational Change

The growth of (the company) [redacted] in terms of numbers of locations has created a heavy demand in employee and management needs in all areas, but especially in the areas of training and employee safety. In order to assure that these needs are better met, the following changes are being made effective immediately.

Mr. NAME [redacted] will be assigned full time to the position of Safety and Health Manager. [redacted] technical expertise in this area is required on this basis in order to meet the Company's goal of providing the safest possible workplace for our employees.

Ms. NAME [redacted] is promoted to the position of Training Manager. In this role, [redacted] will be able to provide creative training programs for all phases of the Company's business. [redacted] will continue to coordinate the Resource Awareness Program (RAP) throughout the Company.

July 1, 1982

Memo To: Messrs: [redacted] (NAMES) [redacted]

CC: [redacted] (NAME)

Subject: Management Training Needs In [redacted] (COMPANY)

One of our objectives is to design programs for [redacted] COMPANY that will be helpful in our long and short term development in management. I would like your help in suggesting those types of programs or areas that could be made a part of another program that are needed. These recommendations will help us put together a total package over the next few years that will incorporate the most critical areas for our Company.

Attached is a sheet which I would appreciate your completing and sending back to me with your indications of the areas that need attention. If possible, state specifics that you feel would be needed.

For purposes of this training consideration, we are breaking down management into three groups. Thus, we may consider them seperately for training, if any is necessary;

<u>TOP MANAGEMENT</u> - This would include generally the group to whom this letter is addressed.

<u>MIDDLE MANAGEMENT</u> - This would include those people who report to you, example: production managers, operations managers, sales managers, administrative office heads, and the like.

<u>SUPERVISION</u> - This would include those persons who actually supervise clerical or production and maintenance groups and would cover such people as squad leaders, production and maintenance supervisors, estimating supervisors and the like.

In order to assist you in thinking about some of the areas that might be needed for training or development, a list is attached. This list is certainly not all inclusive and may only be needed as a guide line for some of your thinking. Use these and any others that you may wish to indicate on the return sheet.

[redacted] (NAME) [redacted]

POSSIBLE MANAGEMENT TRAINING AREAS

-Stress Management
-Career Planning

-Communication
  -Written
  -Verbal
  -Non-verbal (body language)

-Motivating
  -How to get employees to do what you want?
  -How to make <u>all</u> jobs more interesting.

-Industry Education
  -Facts
  -What & Who To Read
  -Who's Who?
  -What's Happening?

-Time Management
  -Goal Setting
  -Delegating
  -Filing Systems
  -Effective Meetings

-Listening

-Planning
-Scheduling
-Decision Making

-Introducing Change
  -Control Rate
  -Control How
  -Making It "Easier To Take"

-Relationships
  -Importance Of Trust
  -Supportive Enviroment

-Skills (For Your Area)
  -Sales Training
  -Purchasing Training

-Cross-Skill Training
  -i.e.-Basic Accounting For Those W/Sales Background
  -Production Techniques For Those From Non Production Areas, Etc.

-Employee Benefits
-Handling Employee Complaints
-Performance Reviews
-Employee Orientation
-Financial Management
-Understanding Employees
-Legal Aspects
-Safety
-Interpersonal Relations
-Salaried And Wage Administration
-Counseling Techniques
-Handling Discipline
-Alcohol And Drug Abuse
-Employee Coaching
-Interdepartmental Information
-Documentation
-Effective Speaking
-Effective Presentations
-Problem Solving

Return This Sheet To [redacted] (NAME)

TRAINING NEEDS

Below are the areas, in each of the three management groups, that I feel specific training should be provided:

I. Top Management

II. Middle Management

III. First Line Supervision

6/82 SIGNED ____________________

January 21, 1983

(NAMES)

Memo To: [redacted]

CC: [redacted] (NAME)

From: [redacted] (TRAINING MANAGER'S NAME)

Reference: Training Needs Analysis

As previously discussed, the attached sheet is to aid in analyzing our short-term and long-term training needs.

Your input is very important, if our program is to reflect the specific needs of our company. Your recommendations will help us to put together a program that, over the next few years, can directly address these needs.

Thus, please give the subject some careful consideration and complete the attached sheet. Please return the sheet to me by February 4, 1983.

Those of you who have previously filled out one of these, need not fill it out again--and we thank you!

TRAINING NEEDS

Below are the areas, in each of the three management groups, that I feel specific training should be provided:

I. Top Management

II. Middle Management

III. First Line Supervision

6/82

SIGNED ______________________________

August 27, 1982

Memo To: [redacted] (VP, INDUSTRIAL RELATIONS' NAME)

From: [redacted] (TRAINING MANAGER'S NAME)

Reference: Training - Critical Issues

Attached is a list of training needs taken from the needs assessment questionnaire you sent to members of top management. (14 out of 27 returned)

Those subjects marked with an asterisk appeared under all three management level headings.

The big questions now are:

(1) Where do we start? and

(2) How much commitment do we really have?

Training Needs

Top Management

*Communication
*Planning
*Time Management
*Motivating
*Listening
*Change Management
*Performance Review

Accounting Reports
Stress
Industry Education
Relationships-Trust
Financial Management
Budgeting

Middle Management

*Communication
*Planning
*Time Management
*Motivating
*Listening
*Change Management
*Performance Review

Decision Making
"Slow Down" Management
Inventory Control
Sales
Scheduling
Delegating
Financial Management
Legal Concerns
Documentation
Speaking
Problem Solving
Cross Skills
Report Writing

1st Line

*Communication
*Planning
*Time Management
*Motivating
*Listening
*Change Management
*Performance Review

Equality
Inventory Control
Orientation
Documenting
Alcohol & Drugs
Complaints
Goal Setting
What To Supervision
Counseling Techniques
Safety
Cross Skills
Handling Authority

INTRACOMPANY MEMORANDUM

See Below	FROM: [redacted] (TRAINING MGR'S NAME)	DATE: 1-26-84

JECT: Management Academy - February 7-9, 1984

[redacted] (NAMES)

[redacted] (NAMES)

We would like to provide you with a few more details of the Management Academy.

(1) Our purpose is:
  (a) to gain knowledge and skills to enhance our role as managers
  (b) to gain a better understanding of the importance of teamwork and our role in developing the team
  (c) to evaluate the effectiveness of the Academy in meeting both a and b.

(2) The session will begin at 9:00 a.m. on February 7, 1984.

For those arriving on February 6th, breakfast will be served in the dining room at 8:30.

(3) Attached is a copy of the agenda for the sessions.

(4) Some housekeeping details:
  (a) Address & Telephone Number Is:

The Conference Center
P.O. Box 321
Brown Summit, NC 27214

Note: (1) Messages will be delivered <u>only</u> during breaks and/or placed on a message board.

(2) There are pay phones available in the main hall. There are no phones in the individual rooms.

  (b) There are no T.V.'s, so come prepared to communicate.

  (c) All room and meal charges will be accumulated on a single bill.

  (d) DRESS IS CASUAL!

NEWSLETTER

CENTER FOR CREATIVE LEADERSHIP

LDP Licensed to PDI

The Center for Creative Leadership and Personnel Decisions, Inc., of Minneapolis, have signed a two-year contract under which PDI has been licensed to conduct the Leadership Development Program.

Personnel Decisions, Inc., was established in 1967 as a specialized psychological assessment firm. Since then it has experienced exceptional growth and is now a highly respected full-service company of organizational psychologists. Its clients include Fortune 500 companies, medium and small organizations in all industries, and governmental operations at local, state, and national levels. PDI's services include in-house training programs, individualized coaching, human resource systems consultation, professional appraisal services, management development program evaluations, organizational consultation, and outplacement and career counseling.

Demand for the Center's Leadership Development Program has increased dramatically over the last several years. PDI joins the ranks of such organizations as the University of Maryland, Eckerd College, Ashridge Management College/Centre for Leadership & Organisational Resources (England), and Tecnologia Administrativa Moderna (Mexico) in accommodating those who wish to attend this week-long workshop. (See Upcoming Programs for scheduled dates.)

Dale Joins Staff

Dr. Robert D. Dale, Professor of Pastoral Leadership and Church Ministries and Director of Advanced Professional Studies at Southeastern Baptist Theological Seminary, will spend part of his sabbatical as a member of the Center's staff.

Dr. Dale's educational background is in psychology and religion. He holds a B.A. from Oklahoma Baptist University, a B.D. and Ph.D. from Southeastern Baptist Theological Seminary.

He is the author of four books, the latest of which focuses on organization development in congregations and other nonprofit organizations.

Change in LGI Directors

The management of Looking Glass, Inc., the Center's organizational simulation, recently changed hands.

Dr. Robert E. Kaplan, who has been with the Center since 1979, has been named Director of Looking Glass, taking over from Dr. Michael M. Lombardo. Dr. Lombardo has managed LGI through four years of change and growth; he now returns to an active research role, expanding his involvement in the Research Sponsor Program and directing a wide-ranging research program focusing on the Looking Glass data bank.

Dr. Kaplan, who has contributed substantially to the Center through his directorship of the Workshop in Organizational Action and other research projects, will now focus on continuing the growth in the use of LGI.

Board Member Elected

The Center's Board of Governors elected a new member at its September meeting.

Robert E. Frazer is Chairman and Chief Executive Officer of The Dayton Power and Light Company. A graduate of Central Michigan University, Mr. Frazer is a member of several professional organizations and is an active participant in a number of community and civic activities.

Frazer

LABOR FORUM '84
BUILDING ON THE BASICS
October 30-31

7:30 - 8:00 a.m.	Registration	
8:00 - 8:15 a.m.	Welcome	Jackie Bolt President, GAPA
8:15 - 9:45 a.m.	"The One Minute Manager Meets the Monkey"	Hal Burrows
9:45 - 10:15 a.m.	Break	
10:15 - 11:45 a.m.	"The One Minute Manager Meets the Monkey" (Continued)	Hal Burrows
11:45 - 12:45 p.m.	Lunch	
12:45 - 1:00 p.m.	Local Labor Scene	Bill Miller Greenville Chamber of Commerce
1:00 - 2:30 p.m.	"Responding to the Differences in People"	John Evans
2:30 - 2:45 p.m.	Break	
2:45 - 3:45 p.m.	"Responding to the Differences in People" (Continued)	John Evans

MANAGEMENT ACADEMY

FEBRUARY 7-9, 1984

AGENDA

TUESDAY, FEBRUARY 7:

8:00 - 9:00	BREAKFAST	DINING ROOM	
9:00 - 12:30	MEETING	ROOM 2-3	LEN BERGER
(10:30)	BREAK		
12:30 - 1:30	LUNCH	DINING ROOM	
1:30 - 5:00	MEETING	ROOM 2-3	LEN BERGER
5:30 - 6:30	SOCIAL	FIREPLACE ROOM	
6:30 - 7:30	DINNER	DINING ROOM	
7:30 -	ACTIVITY, FREE TIME	FIREPLACE ROOM	
9:00 -	SNACK	FIREPLACE ROOM	

WEDNESDAY, FEBRUARY 8:

8:00 - 9:00	BREAKFAST	DINING ROOM	
9:00 - 12:30	MEETING	ROOM 2-3	GEORGE ANDERSON
(10:30)	BREAK		
12:30 - 1:30	LUNCH	DINING ROOM	
1:30 - 5:00	MEETING	ROOM 2-3	GEORGE ANDERSON
5:00 - 6:00	SOCIAL	LOBBY	
6:00 - 7:00	DINNER	DINING ROOM	
7:00 -	FREE TIME		
9:00 -	SNACK	COTTAGE CONFERENCE ROOM	

THURSDAY, FEBRUARY 9:

8:00 - 9:00	BREAKFAST	DINING ROOM	
9:00 - 12:30	MEETING	ROOM 2-3	KAY LEVAN
(10:30)	BREAK		
12:30 - 1:30	LUNCH	DINING ROOM	
1:30 - 3:30	MEETING	ROOM 2-3	BOB CARR
3:30 - 4:00	ADJOURNMENT		

(COMPANY)
[redacted]

LISTENING FOR RESULTS

August 2, 1984

Evaluation

1. Considering the overall training session, how worthwhile was it in terms of time spent?

Comments:

"One of the better areas of the training session."

"It helped me know that I'm not as good a listener as I thought I was."

"Worthwhile. Reinforced some concepts covered in other sessions but introduced some good techniques that can be put to use tomorrow."

"Not very worthwhile because most of this was covered by previous speakers and seminar on performance appraisals."

"This listening session was very worthwhile."

"This session repeated some information from other sessions but I see how everything from the last 2 1/2 days fits together and I think the repeated technique in this portion needed to be repeated."

"It was the most worthwhile session for my needs that we had."

"Good."

"The time was well spent."

"Time well spent."

"Very good."

"Very good."

"This was some common sense material. I feel that any sensitive human should have a grasp on this already. The best teacher is a small amount of reflection on each individual's part. After talking to someone, or questioning them, a person should realize what they could have done differently. I think example is the best teacher. So much of this material I've already seen, I just didn't know why."

"Informative. The time spent was adequate."

"I thought the session was very good."

"Very good."

"Most important of all."

"I feel this section was probably more valuable than any to me."

"Worth every minute."

"Showed me that I need to be a better listener."

"It was very worthwhile."

2. Did you feel the material presented was relevant to your function?

Comments:

"Can be applied every day."

"Yes."

"Oh yes. Relevant to any function that involves interpersonal contact."

"Yes, but I have heard it all before."

"Yes."

"Yes. I do not believe I could function without being able to listen and I believe that becoming a better listener will help me become better at my job."

"Very much so."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes."

"Yes, definitely. I plan to try more and more to use these seminars on my daily routine."

"Yes."

"Yes."

"Yes."

3. What were the better points of the day?

Comments:

"See the difference between the two conversations on the tape. I have been very interested in this."

"Whether one is the receiver or the sender, he should be committed to making the "most" of an interpersonal communication."

"The better point of the day was how well people really listen."

"Realizing all the points there are for becoming a better listener."

"Listening habits."

"The teacher was a real good speaker and a enjoyment to listen to."

"Tape playing--understanding it's hard to listen to two people at one time."

"Effective ways to improve listening."

"All."

"Effective listening?"

"Reminders about <u>listening</u> rather than <u>hearing</u> (automatically)?"

"Learning how to better listen to our employees."

"The involvement."

"Relations, or listening to others."

"Using examples."

"Very well presented. Outlines will be very useful for future reference."

"Tapes showing current ways to listen and ask questions."

"Talk about the handouts."

4. Is there anything you would have changed, deleted, improved, etc.?

Comments:

"None."

"No."

"Would have deleted most of this except for portion on 'listening' which could be included in previous."

"No."

"I would like to see more specific exercises."

"No."

"No."

"No."

"No."

"No."

"No."

"VCR presentation was good touch--would like to see more used."

"No."

"None."

"No."

"No."

"No."

"No."

5. Would you recommend similar sessions? If so, what subjects would you like to see addressed?

Comments:

"Yes, time management."

"Yes."

"Yes."

"Yes."

"Management training."

"Yes."

"Yes."

"Yes."

"Yes. Most any subject in regards to our working place would be helpful."

"Yes."

"Yes."

Other Comments:

"Video examples were very good."

INTRACOMPANY MEMORANDUM

: [redacted] (NAME) IND REL VP	FROM [redacted] (NAME) TNG MGR	DATE: 5-23-84

BJECT: Management Academy

As you know, almost all of the evaluations of the academy have been very high. However I have been surprised to find some people arriving with strong negative feelings.

Some come perceiving their being "forced", some come having no idea what the academy is about and many come having no idea why they are there. It seems important that the attendees know their managers approved the list and, in some cases, requested they be there. That is why the advance attendance list and description of the academy were sent to the managers. So they could explain the purpose of the sessions and I would be merely supplying details.

We are spending a great deal of time, effort and money on the sessions. It is a shame that some, because of preconceived negative feelings, must take 2½ days to realize they have had a good experience, or worst, some never do.

I think we could benefit from some discussion by the preview group with their managers. It appears they are not "talking up" the academy. I thought that was why they were asked to evaluate and participate in the preview--to be opinion leaders.

The academy was intended to be a very positive experience--almost a management retreat. Since the evaluations are so high, I must believe there is a problem with our pre-attendance discussions and/or information.

SUMMARY OF CASE STUDY RESUL
INDICATORS OF FIRM'S ADHERENCE TO TYLER'

(Y = YES; N = NO INDICATION; ? = UNCERTAIN; N/A = NOT A

TYLER QUESTION		CURR DEVELOPER/ PROGRAM ADMIN	SUBJECT MATTER EXPERT A	SUBJECT MATTER EXPERT B	PARTICIPANT A
1. WHAT TRAINING OR DEVELOPMENT PURPOSES DOES THE MD PROGRAM SEEK TO ATTAIN?	A	Y	Y	?	Y
	B	Y	Y	Y	Y
	C	N	N	N	?
	D	Y	N/A	N/A	?
	E	Y	N/A	N/A	N
	F	Y	N/A	N/A	N
	G	Y	N/A	N/A	N/A
	H	N	N	N	N
	I	?	?	?	N
	J	Y	N/A	N/A	N/A
	K	N	N/A	N/A	N/A
	L	Y	N/A	N/A	N/A
	M	N	Y	Y	N/A
	N	?	N	?	N/A
	O	?	Y	N	N/A
	P	Y	N	N	N
	Q	Y	Y	?	N/A
	R	Y	N/A	N/A	N
	S	N	N/A	N/A	N
2. HOW ARE LEARNING EXPERIENCES OR MODES OF TRAINING SELECTED WHICH HELP ATTAIN THE OBJECTIVES?	A	Y	Y	Y	Y
	B	Y	Y	?	Y
	C	Y	Y	Y	Y
	D	?	?	N	?
	E	Y	Y	N	?
	F	?	Y	Y	N
	G	Y	Y	?	Y
3. HOW ARE THE LEARNING EXPERIENCES OR MODES OF TRAINING ORGANIZED FOR EFFECTIVE INSTRUCTION?	A	Y	?	Y	Y
	B	N	?	N	N
	C	?	N	?	N
	D	N	N	N	N
	E	?	N	N	N
	F	N	?	N	N
	G	N	?	N	N
	H	N	Y	N	?
	I	?	Y	N	N
	J	Y	N/A	N/A	N
4. HOW IS THE EFFECTIVENESS OF LEARNING AND OF THE MD PROGRAM EVALUATED?	A	N	N	?	N
	B	?	N	N	N
	C	N	N	N	?
	D	?	?	?	N
	E	N	N	N	?
	F	N	N	?	N
	F	?	?	Y	N/A
	G				

APPENDIX D

MARY OF CASE STUDY RESULTS
IRM'S ADHERENCE TO TYLER'S FRAMEWORK

) INDICATION; ? = UNCERTAIN; N/A = NOT APPLICABLE)

UBJECT MATTER EXPERT B	PARTICIPANT A	PARTICIPANT B	STAFF MANAGER	DOCUMENT REVIEW	TRAINING SESSION OBSERVATION
?	Y	Y	Y	Y	N
	Y	Y	?	Y	N
N	?	Y	?	?	?
N/A	?	N	N	N	?
N/A	N	N	?	N	?
N/A	N	N	N	N	?
N/A	N/A	N/A	Y	Y	Y
N	N	Y	Y	N	N
?	N	?	Y	N	Y
N/A	N/A	N/A	Y	Y	Y
N/A	N/A	N/A	Y	Y	Y
N/A	N/A	N/A	Y	Y	N/A
	N/A	N/A	Y	?	N
?	N/A	N/A	?	?	N
N	N/A	N/A	Y	Y	N
N	N	N	N/A	?	N
?	N/A	N/A	Y	N	N
N/A	N	N	N/A	N	N
N/A	N	N	N	N	Y
	Y	?	Y	Y	Y
?	Y	?	?	N	Y
	Y	Y	Y	N	Y
N	?	Y	?	N	?
N	?	?	Y	N	Y
	N	?	N	N	Y
?	Y	Y	?	N	Y
	Y	N	Y	?	Y
N	N	N	N	N	?
?	N	N	Y	N	Y
N	N	N	N	?	Y
N	N	N	N	N	Y
N	N	N	N	?	Y
N	N	N	?	N	Y
N	?	N	Y	N	Y
N	N	N	N	N	N
N/A	N	N	N/A	N	Y
?	N	N	N	N	?
N	N	N	N	N	?
N	?	N	N	N	?
?	N	N	?	N	?
N	?	?		N	Y
?	N	?	?	N	N
	N/A	N/A	?	?	Y