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Teaching Note

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ABSTRACT

This teaching note reports on how participation in a seminar on Community Involvement helped the author learn important organizational consultant skills, while helping an organization in trouble recognize structural sources of its difficulties.

This teaching note reports on a practicuum experience in the development of organization consulting skills. It will discuss the practicuum experience in the three major contexts in which they took place: 1) the formal classroom experience of the seminar; 2) the recipient of services, the XYZ[1] corporation; and 3) the intermediary between the classroom and the recipient of services, the United Way/United Black Fund Management Services Corporation. This paper describes how the practicuum experience allowed me to serve as a consultant to a corporation, and what I learned from that experience.

The Clinical Sociology Course

The Community Involvement Seminar at Georgetown University is a practicuum experience in clinical sociology designed to last for one or two semesters. The emphasis of the seminar changes from semester to semester and has included: counseling and crisis intervention, community organizing, program administration, and social program evaluation. The primary purpose of the seminar during the Spring 1983 semester was to provide intervention skill experience in organization consulting and in other forms of community involvement for undergraduate and graduate students in sociology who are developing their skills in social intervention. The Spring 1983 Community Involvement Seminar syllabus stated: "This semester students will read about and discuss intervention skills at the following levels: interpersonal, organizational, interorganizational and

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societal. All seminar participants will work with different organizations or social movements. No placements will be in on-campus organizations or in politicians' offices.''

The seminar process included a series of exercises which facilitated the overall learning of intervention skills, and provided valuable help and support to the students.

1. The seminar provided students with a social support group while they explored internship possibilities and problems. The social support system was valuable to me in a number of ways. For example, I did not feel isolated or alone in the problems I faced during my internship. The sharing of experiences with other people who were having similar problems and successes in their own practicuum experience helped me to understand myself and my role as a possible instrument of social change. Students were encouraged to meet with the seminar director individually (as frequently as needed) and with the seminar participants (about nine times a semester) to discuss their efforts. Graduate students were given additional readings and a research project.

2. The seminar provided a context in which to ''sound off'' about problems encountered in the internship. The context and purpose of the seminar made it safe to express opinions about the experience that might be damaging if expressed directly to the organization where I was working.

3. The seminar also provided an opportunity for students to share ideas and suggest potential lines of action during the internship. This process was guided by the seminar director, who often served more as a group and idea facilitator than as a teacher.

4. Students were required to keep a journal of their experience, including both a ''chronology of events'' and a ''commentary'' section. The journal was handed in weekly to the seminar director. The journal turned out to be a record of the internship and a diary of self-development. The process provided a written record for reflection. Events which might otherwise have been forgotten appeared in the journal as a matter of course. The written account also became a reference and guide to the progress of my own learning during the internship.

The internship itself was located through a network of organization consultants involved in the community service project of the Metropolitan Washington, DC, chapter of the American Society for Training and Development (ASTD). ASTD actively looks for and recruits new talent to work with seasoned professionals as a way of showing what they can do while sharpening their skills in providing nonprofit social service organizations with management assistance, training and consultation. The internship averaged about eight hours a week for a six-month period. During that time I was recognized as one of the people who helped the local ASTD chapter to win a national service award for outstanding service to the local community.

United Way/United Black Fund Management Services Corporation

The host organization for the internship was the United Way/United Black Fund Management Services Corporation (UW/UBFMSC). Most major cities have a chapter of the UW/UBFMSC, or a mechanism similar to it, as a way to help increase the management effectiveness of local nonprofit social service agencies. A director paid by the UW/UBFMSC recruits volunteer consultants from the local ASTD chapter. The volunteer consultants are expected to provide nonprofit social service agencies with: 1) an opportunity to receive professional training and organizational development services at no charge; 2) assistance in developing their human resources to increase their overall organizational effectiveness; 3) an ability to learn principles and skills that can be continually applied after the consultation or workshop is completed; and 4) a support network that can be activated again, as needed.[2]

Each potential client of the UW/UBFMSC is provided an Agency Request for Services Form. The form lists a series of problem areas, and the client is asked to check these on which consulting services are requested. An example of the kinds of services includes:

> *Agency Policy-making*
> > Board Organization and Structure
> > Policy Development
> > Planning and Goal Setting
> > Resource Allocation
> > Agency Evaluation
> *Corporate Management*
> > By-Laws
> *Agency Administration and Management*
> > Decision Making
> > Problem Solving
> > Time Management
> > Communication
> > Team Building
> > Program Evaluation
> *Personnel*
> > Staff Development and Training
> > Staff Performance Appraisal
> > Position Qualification/Classification
> > Volunteer Recruitment, Training, Management
> > Volunteer/Paid Staff Relations

When a potential client requests services, the request form is put on a docket

until the director of the UW/UBFMSC can match the skill level of a volunteer consultant to the needs of the potential client. In the case of my internship, both the seminar director and the director of the UW/UBFMSC (an M.A. sociologist with extensive organization experience) served as mentors. Thus, although I had not had much direct experience in organization consulting, the availability of consultation help from the mentors aided in providing a match between my skills and the organization's needs.

The XYZ Corporation

The site of my internship was the XYZ corporation. It is an inner-city nonprofit organization, primarily serving the needs of a mostly Catholic, Latin American community through a series of multicultural programs. According to the literature of the XYZ corporation their objectives are:

1) to encourage and enable full participation by Spanish-speaking and other residents in social, economic, political and cultural life of the metropolitan area;

2) to facilitate access to social resources (e.g., health care, housing, employment, legal aid), especially for those who cannot obtain them directly because of language and other culturally related problems;

3) to identify and encourage initiative and leadership within the community, in an attempt to solve its underlying social and economic problems and to facilitate the expression of its ethnic pride and creativity.

Since 1969, the XYZ corporation has grown from a very small group of concerned citizens to an institution of 18 board members, 12 paid staff members and 4 regular volunteer staff members. It received financial aid for its programs from a major Protestant church (as part of the church's urban mission), the United Way, and local and federal government grants. The Protestant church provided XYZ with a building, which was formerly a church, to use as office space. In that building, which was located in the heart of a rapidly changing, predominantly Latin American community, are housed the XYZ corporation and about a dozen sister organizations which administer specific programs.

The XYZ corporation programs can be divided into two general categories: 1) programs that provide newly arrived and established Latin Americans and others with awareness, assistance, information and social support while they face health, legal, economic and language struggles in adjusting to a new social environment, and 2) recruitment of volunteers to staff, manage and organize programs, and the facility in which the programs are administered.

The XYZ corporation offers approximately 11 programs which serve more than 7,000 persons. The budget for these programs exceeded $237,000 in 1982–83.

The Case

In February 1983, the Chairperson of the XYZ corporation Board of Directors filed an Agency Request for Services with the UW/UBFMSC. The Chairperson identified the XYZ corporation's need for assistance in Agency Policy-making, Corporate Management, Agency Administration and Management and Personnel. Although the Agency Request for Services Form listed other services such as Marketing and Public Relations (e.g., Packaging the Agency Story and Working with the Media) and Finance (e.g., Bookkeeping, Budget, Payroll, Cash Flow, Audit Preparation and Fund Raising), none of these were checked off as problems.

The client's selection of items from the checklist indicated to the UW/UBFMSC director that the problem was organizational rather than technical. My mentors and I felt that the nature and number of problems listed by this potential client offered an opportunity to a new "generalist in organization consulting" to explore the client system to determine the nature of the central problem. We felt that if this central problem identification could be done, specialists could be brought in as necessary to work on specific problems.

The seminar members and mentors suggested, in the very first days of the case, that I spend part of an afternoon sitting in the reception area of the XYZ facility and then walk through the entire building so that I could observe first hand what was going on there. During my visit I noticed that a lot of the people that XYZ served were new immigrants who showed strong national pride. Also, I could see that the Latin American groups who migrated here much earlier viewed themselves as being higher in the social order of the community than were the recent immigrants.

The mentors suggested the logical next step for me would be to interview the Chairperson of the XYZ corporation Board of Directors because she filed the Agency Request for Services on behalf of the XYZ corporation. The Chairperson had a number of rich and important insights regarding the history and organization of the XYZ corporation. For example, she pointed out that XYZ was founded on the belief that the corporation was to be "one big happy family." Time and the proliferation of other competitive interest groups, some of whom were located in the same building with XYZ, had changed this idea. The Chairperson said that the XYZ corporation now "seemed like a sinking ship with the crew members each looking after their own outside interests."

After the interview, the Chairperson and I examined the list of Board members and selected the next persons for me to interview. The seminar mem-

bers, mentors, Chairperson and I all agreed that personal interviews with some of the XYZ corporation Board members and staff represented the least politically disruptive approach to gaining in a short time a lot of information about the nature of the problem. Other approaches posed nagging worries. For example, interviews with XYZ's clients might cause concern about the ability of XYZ to keep delivering services to clients. Participative approaches, such as sitting in on Board and staff meetings, were ruled out because of possible self-monitoring (Let's put on a happy face for the consultant) that could occur during the once-a-month Board meetings and weekly staff meetings.

A snowball sample of 12 people were interviewed between February and May 1983. I believe that the persons interviewed fully represented the range of views held by members of the XYZ corporation. For example, 50% of the Board members, 25% of the paid staff, and 25% of the volunteer staff were interviewed. The board members were carefully sampled because the Board is a policy making group whose actions and decisions influence the staff, and the Board was known to be factionalized.

The snowball sample approach of conducting an interview and then asking the interviewee to suggest other persons to be interviewed was an important tool in gaining access to people who might not otherwise want to talk to me. I could now say to a potential interviewee that the Chairperson of your Board of Directors suggested that I give you a call. The snowball sample approach provided more than just entry. I was careful to insure that the interviewees selected provided me with a balanced definition of the situation. Each interviewee was told whom I had interviewed previously and was asked to steer me toward someone with a different view. During the interviews I was guided by the theoretical view that "social position influences a person's viewpoint." I was careful to select inter-viewees who represented different social positions outside of, as well as within the XYZ corporation Board of Directors. For example, Board member inter-viewees represented a good balance between long-standing and more recent appointees. Also, the list of Board members was thoughtfully screened in order to make sure that interviewees that I was being steered toward represented very different work roles, such as director of a children's center, president of a law firm and a federal program officer. This approach to locating the interviewees provided me with respondents whose distinct view of the problem was based on their unique social vantage point inside and outside of the XYZ community.

All interviewees commented about a serious lack of organization and co-herence in the activity of the XYZ corporation. These problems began two years earlier when the then Executive Director resigned and was replaced by two Associate Directors, each of whom had separate goals. This situation seemed to encourage each of the two Associate Directors to pursue their own vision of the XYZ corporation's mission.

The Associate Directors did this by appealing to their friends on the Board

of Directors for support when facing situations which could advance their vision. The result of this activity factionalized and crippled the XYZ corporation, preventing it from remaining a viable enterprise. Also, many of the interviewees commented on how weak the two Associate Directors were, either singly or as a team, in providing leadership to the XYZ corporation in its time of need. During an interview one of the Board members told me of a situation that graphically illustrated these two points. It was reported that one of the Associate Directors and several Board members changed the meeting site of the monthly Board meeting in order to exclude Board members who did not agree with their views on a certain issue. The move backfired when neither of the two groups had enough Board members in attendance at their meeting to form the quorum needed to vote on the issue.

Analysis and Insight: The Learning Process

I presented the interviewee comments during several "case conferences." The case conferences provided a safe and creative setting in which to think through the nature of the XYZ corporation's problem while I constructed a line of action ("decision tree") that could address the problem. The case conference approach provided me with access to others who acted as a looking glass for me while I constructed a (prescription) final report for the client. These others helped me, as a developing organization consultant, to make sense of, refine and redefine my report and myself as a change agent in the XYZ corporation.

I brought to the seminar and its director, and to the director of the UW/UBFMSC, the comments made by the interviewees regarding the nature of XYZ's problems. I also gave them my view of the prescription for solving those problems. This approach enabled me to shape the interviewee comments into practical management advice. For example, the mentors suggested that the XYZ corporation's mission, as listed in its by-laws, did not seem to fit with some of the interviewee comments about their view of that mission.

Feedback given me by the case conference advisors suggested that the interviewees' comments be placed on a decision tree with the tap root of the problem being located in the decision that the XYZ corporation needed to make about its mission. The trunk of the decision tree contained two alternatives: 1) keep the administrative structure as it is now and change the mission of the XYZ corporation, or 2) keep the mission of the XYZ corporation as it is now and change the administrative structure.

Each decision point was portrayed·as having a number of chance events (branches) that stem from the trunk. These chance events represented potential outcomes for the XYZ corporation of either choice concerning their two decisions. The outcomes were sketched along the lines of what was happening now, as indicated in the interviewee comments, compared to what could happen if change took place. For example, the current administrative structure was without

an Executive Director. Having no Executive Director meant that everyone was in charge. The latest crisis was the boss, and everyone served that boss. The Board of Directors lost energy and direction responding to each new crisis. The hiring of an Executive Director would mean a change in the administrative structure. This change would prevent role expansion (as in the situation of the two Associate Directors who tended to counteract and neutralize each other) and the obligations that role performers claim when they repeatedly perform work beyond what is expected of them. A change of this type would probably give the XYZ corporation Board of Directors more time to focus on the development of their programs.

Early in the consultation I had believed that what the XYZ corporation needed was a better management system. In the process of dialogue between me and those in my social support system (the seminar participants, clinical sociology seminar director and director of the UW/UBFMSC), we concluded that the interviewee comments indicated a need for a strong Executive Director who could unite factions and institutionalize more systematic management procedures. My final report reflected this view.

The XYZ corporation received the final report by mail one week before the August Board meeting. The Executive Director of the UW/UBFMSC and I presented the final report and answered all questions from Board Members at the August Board meeting. The final report was favorably received with such comments as: "It seems that you took a picture of the XYZ corporation." "We agree with your report, but it hurts to hear the truth."

When the XYZ corporation Board Members no longer had any questions to ask me, the UW/UBFMSC director urged the Board members to consider having another UW/UBFMSC consultant help them process and implement the final report. The switching of consultants is standard policy for the UW/UBFMSC for two reasons. First, it encourages objective consultant-client relations. Second, it signals that this stage of the XYZ case had come to a close.

Since my involvement with the XYZ corporation ended, the last information that I received was that the new consultant was helping XYZ to slowly come to grips with how to bring about changes suggested in my report.

I hope that this account of my internship experience will be useful to "new" clinicians and others who are developing organization consulting skills. The procedures and techniques described in this teaching note should help these organization consultants develop their skills by working with others in the teaching and practice of clinical sociology.

NOTES

1   The name of the client organization has been changed to the XYZ corporation in order to maintain anonymity and confidentiality
2   This information was listed under the Volunteer Consulting section in the Washington, DC, UW/UBFMSC brochure