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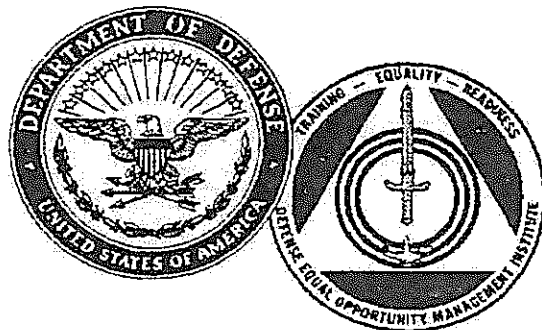


USING MILITARY EQUAL OPPORTUNITY CLIMATE SURVEYS FOR ORGANIZATIONAL DEVELOPMENT

by

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USING MEOCS SURVEYS FOR ORGANIZATIONAL DEVELOPMENT

ABSTRACT

Use of the Military Equal Opportunity Climate Survey (MEOCS) as an aid in organizational development is discussed within the broader context of the APIE (Assess, Plan, Implement, Evaluate) model. Background on use of organizational surveys, including a description of the MEOCS model, is reviewed. The APIE model is described and applied to organizational development.

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The opinions expressed in this report are those of the author and should not be construed to represent the official position of DEOMI, the military services, or the Department of Defense.

Introduction

Surveys are classic tools used by organization development (OD) consultants as a basis for organizational assessment and change (e.g., Schein, 1969; Bowers & Franklin, 1975; Hausser, Pecorella, & Wissler, 1977; French, 1985). Landis, Dansby, and Faley (1993) describe the philosophy and program supporting MEOCS as an aid to organizational improvement. As an OD tool, MEOCS is well accepted by military commanders and organizational leaders in the U.S. military services (having been requested by over 3,000 organizational heads and administered to over 400,000 respondents). Because of the efficiencies attained by centralized administration and analysis of the survey, MEOCS has become the single most used OD survey reported in the literature. In some respects, therefore, it might serve as a contemporary model for OD survey-guided intervention in large organizations. In this section, we discuss general principles of survey-guided intervention in the context of a broader OD model developed in the U.S. Army organizational effectiveness (OE) community. These principles could readily be extended to an international and intercultural context, as discussed elsewhere in this chapter.

Background: Organizational Surveys as an OD Tool

Bowers and Franklin (1975) describe the basic process of survey-guided development, and Hausser, Pecorella, and Wissler (1977) summarize its main goal: "to facilitate interventions or changes in organizational functioning that will lead to increased organizational effectiveness by providing accurate and useful information about how an organization actually functions, how it might ideally function, and how to make the actual functioning more like the ideal functioning" (p. 5). For a comprehensive review of the development of the survey feedback approach, see French (1985). French (1985) identifies the work of Rensis Likert at the Survey Research Center (founded in 1946) at the University of Michigan as the intellectual roots of the OD survey. Perhaps the classic intervention model is that described by Schein (1969). The model involves seven steps:

- (1) Initial contact with the client organization;
- (2) Defining the relationship, formal contract, and psychological contract;
- (3) Selecting a setting and a method of work;
- (4) Data gathering and diagnosis;
- (5) Intervention;
- (6) Reducing involvement;
- (7) Termination. (Schein, 1969, p. 78)

Other researchers and practitioners have described similar models (e.g., Lippitt & Lippitt, 1978; Nadler, 1977; Umstot, 1980; Landis, Dansby, & Faley, 1993). Elsewhere we have described the model used with the MEOCS (Landis, Dansby, & Faley, 1993), along with its unique features when compared to more traditional OD surveys. The MEOCS approach is based on a six-step model:

- (1) **CONTACT** (bringing together the military commander and the survey managers at DEOMI)
- (2) **CONTRACT** (setting the mutual expectations, or psychological contract, between the organization and DEOMI)
- (3) **DATA GATHERING** (administration of the survey in accordance with standard guidelines)
- (4) **DATA ANALYSIS** (processing the raw responses into meaningful information)
- (5) **FEEDBACK OF INFORMATION** (conveying understandable and useful results to the organization's leaders)
- (6) **FOLLOW-UP** (using the results to effect organizational change and improvement).

As discussed previously (also see Landis, Dansby, & Faley, 1993), MEOCS measures a number of equal opportunity (EO) and organizational factors that are of interest to military leaders. It is a voluntary, confidential survey, with feedback returned exclusively to the requesting commander. Consequently, MEOCS is an ideal tool for a commander who desires a self-assessment of his or her unit prior to proactive intervention to improve the productivity of the unit and quality of life for its members. The commander controls how the survey is used; confidentiality lessens fear of the misuse of information (for political manipulation, etc.; see Zawacki & Warrick, 1976). Such control and "ownership" is critical to the success of MEOCS as a tool for constructive change (Bowers & Franklin, 1975; Landis, Dansby, & Faley, 1993).

Upon receiving a letter of request from a commander, the staff from DEOMI's Directorate of Research determine which version of the survey (based on gender composition and other unit demographics) is appropriate and send the requesting commander a camera-ready copy, along with answer sheets and instructions for proper administration. A unit project officer reproduces the survey booklets, administers the survey according to DEOMI's guidelines, and returns the completed response forms. Response forms are scanned into a raw data file, which is subsequently analyzed using a commercial statistical analysis program. The data are also added to a cumulative database maintained at DEOMI. A series of computer programs developed by the author collect and format output from the statistical program and automatically generate a feedback package, which is returned to the commander. The package includes comparisons between the unit's results and the overall database averages for the appropriate service and the military overall, as well as a number of within-unit demographic comparisons (minority/majority, women/men, etc.). These within-unit comparisons are particularly important. They often indicate gaps in perceptions among the various groups. This can be enlightening for organizational leaders and lead to constructive conversation to identify why the perceptions differ and what can be done to improve the organizational climate.

After the results are returned to the unit, it is up to the commander to conduct (or not) follow-up actions. Most commands have EO program advisors, who may be directed to establish an action plan. DEOMI also provides consultation and mobile training teams at the commander's request (the unit must pay for travel and per diem expenses; there is no charge for the consultation or training).

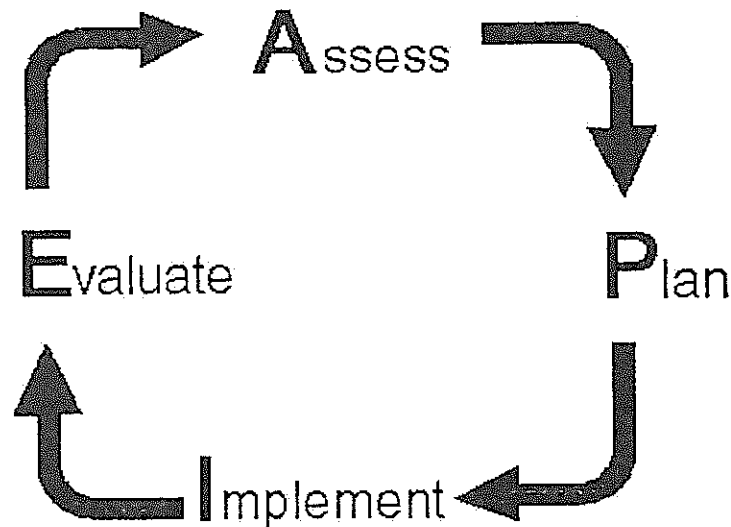
Organizational Effectiveness (OE) Model

As mentioned previously, MEOCS is conducted in the context of a broader organizational intervention and is part of a systems approach to OD. In the late 1970's and early 1980's, the U.S. Army conducted an extensive OE program to help commanders and organizations become more effective. (The Air Force and Navy had similar programs, all of which were eliminated due to budget cuts and other exigencies.) A simple four-step model underscored the philosophy of the Army's program, which was taught in the Organizational Effectiveness Center and School, Fort Ord, California, and the Center for Leadership and Ethics Leader Development Program at the United States Army Command and General Staff College, Fort Leavenworth, Kansas. The OE view is a systems approach, and the model (commonly known as APIE, based on the initial letters for the first word in each step) includes the following steps for rational intervention and organizational change:

- (1) Assess current operation
- (2) Plan for change
- (3) Implement change
- (4) Evaluate change

(U.S. Army Center for Leadership and Ethics)

The APIE process is viewed as continuous and is similar to other models of organizational change, such as the planned-change process discussed by Harvey and Brown (1988), Schermerhorn, Hunt, and Osborn (1991), and Hellriegel and Slocum (1992). The figure below (an abbreviated version) illustrates the iterative nature of the model.



The APIE model provides an apt framework for discussing the use of surveys in Organizational Development.

Using OD Surveys in the APIE Model

The systems approach (e.g., Harvey & Brown, 1988; Hellriegel & Slocum, 1992; Schermerhorn et al., 1991) views organizations as open systems with inputs, processes, and outputs. The APIE model focuses on the process stage, and within the APIE context, surveys such as MEOCS can fulfill several functions in helping organizations change and grow. They serve to provide systems information about organizational processes; when used properly, this information can lead to quality improvement in the organization.

In general, OD philosophy emphasizes helping the client help himself or herself (Schein, 1969) using a collaborative approach (Harvey & Brown, 1988). Commitment ("ownership"; Bowers & Franklin, 1975) by the top organizational leadership is essential to the success of the OD intervention. Without it, much energy may be wasted in attempts to discount the validity of the process or the results (Harvey & Brown, 1988), and few positive outcomes would be expected. The leadership also has the power to influence others (Schein, 1969; Schein, 1985; Harvey & Brown, 1988; Schermerhorn et al., 1991), facilitating meaningful intervention.

Once leadership commitment to the process is attained, surveys can aid in what is commonly called a "gap analysis" (Harvey & Brown, 1988), in which a current state is compared to a desired state. The difference, or gap, between these two states is used as a basis for action planning to close the gap. Within the APIE model, the Assess stage is where the current state is determined. The survey provides a comprehensive, often less biased, view of the current state. In the case of MEOCS, the gaps considered are in the areas of EO and OE, or more generally, human relations and organizational process. It is important to recognize that surveys are only one among many tools that may be used in the gap analysis. Interviews, examination of organizational records and reports, and systematic observations are examples of other tools that may (and should) be used as well. Information from all sources should be considered in order to validate and clarify survey results.

Once the current state is determined, the planning begins. In the Plan step, potential ways of bridging the gap between the current and desired states. The survey results are used as a basis for planning interventions more rationally. In providing information regarding specific concerns, the results help bring focus and direction to the planning. Broad organizational involvement is needed to foster support for planned interventions and to help overcome the normal resistance to change (Harvey & Brown, 1988; Schermerhorn et al., 1991). Sharing the survey results with the entire organization can help generate a sense of involvement and, by highlighting the concerns (based on information provided by unit members), motivate members to participate in the change process.

The next step in APIE is to Implement the planned actions. Normally the interventions will occur over some time, and it will take additional time for the actions to gain acceptance and have an effect in the organization. The purpose of the interventions is to help close the gap between the current and desired states. Consequently, some method

of assessing the effects of the interventions is needed to determine how much progress (if any) has been made in closing the gap.

This is where the survey is again useful. When the organization is ready to **Evaluate** the impact of its actions, the original survey results may be used as a baseline for comparison with a second survey administered after the intervention process is complete. It is essential that the survey versions be comparable in order to use this pre- post-intervention evaluation methodology effectively. The results of the evaluation may reveal the actions taken were effective; on the other hand, they may imply old action plans need adjustment or new actions must be formulated. The commander and organizational staff evaluate the need for adjustment and proceed from there.

Since the APIE process is iterative, it should be repeated periodically to keep commanders aware of organizational issues and facilitate constructive change. Since MEOCS provides an inexpensive, informative, and useful tool for commanders who want to pursue rational change, it encourages commanders to use the APIE process. The desired result is a more effective organization with more motivated members.

Conclusion

The use of MEOCS as an OD/OE tool, within the framework of a systems model (APIE) provides many advantages to users. Among these are the ability to gain insight into human relations and effectiveness using a more objective approach than is typical in many organizations, while at the same time costing the organization relatively little. The value of this information, when properly validated, is great; it can facilitate gains in effectiveness of the organization and satisfaction of its members.

In a broader intercultural context, the survey methodology also has much to offer. If properly designed, conducted, and analyzed, and if the results are properly used, it can increase communication across demographic barriers. This can lead to increased sensitivity and intercultural understanding, better human relations, and increased individual satisfaction. Though MEOCS models the process in a military context, it could easily be applied in other settings, such as communities, schools, universities, police and fire departments, other government agencies, businesses (especially international), and religious organizations. This potential should not be overlooked when seeking ways to improve understanding and human relations.

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