Organization Assessment and Diagnosis
Spring 2010 Syllabus

CRN 2093 / MGMT 6518

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Instructor:

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Course Description:

According to David Nadler (1977) "Anyone working to help an organization grow, develop, and learn must collect and interpret data, and, in some way, must present the data to the people in the organization." This course covers a range of methodologies for collecting, organizing, and analyzing data. We explore data collection through such strategies as survey instruments, structured interviews, and focus groups. This is coupled with techniques for analyzing complex data. Also emphasized is managing the data feedback process so that clients can understand the assessment, envision the necessary steps to improve performance, and remain committed to the resolution of the identified problems. Finally, we will examine in detail the role the consultant must play to increase the likelihood of an effective outcome for the client.

Ultimately, the objectives of this course are to:

1. Understand the way in which data can be used to drive organizational change;
2. Understand the process of completing an organizational assessment and diagnosis;
3. Examine the role of the Consultant and the Client in the assessment and diagnosis process;
4. Provide Clients with information that will enable them to make decisions about their organizations.

Diagnostic (GROUP) Project

To help develop a deep understanding of the steps associated with an organizational assessment, students will work in "Consulting Groups" to ***design and implement an actual diagnostic project.*** In other words, students will work with a real client to experience the assessment and diagnosis process. The first three sessions of this course are designed to prepare Consulting Groups to initiate this project and work with their Clients. ***More details about this project are outlined on the next page, and will be provided during our first session.***

Use of Black Board and Google Docs

This course relies on regular use of Black Board and Google Docs. Specifically, Black Board will be used to distribute materials required for class and for the Diagnostic Project. Students are asked to check Black Board twice each week for updates. . Google Docs will be used to gather input from Consulting Group members to develop client deliverables / project assignments. Support is available to those students who are unfamiliar with Black Board

Diagnostic Project Overview

What is the Diagnostic Project? Why are we doing this?
To help develop a deep understanding of the steps associated with an organizational assessment and diagnosis students working as a consulting group will ***design and implement an actual assessment and diagnostic project.*** The goal is to provide students with a rich learning experience that will help them in their careers. In addition, working in a group provides students with the experience of learning from each other, and reflects the reality that organizations use teams to get work done. Students should expect to experience the ups and downs associated with this type of work – it can be fun, challenging, and frustrating all at the same time! In general, students will go through each of the phases associated with an Organizational Assessment and Diagnosis. That is, students will go through the following phases:

1. Entry;
2. Data Collection;
3. Data Analysis;
4. Data Feedback;
5. Follow-up.

What Kinds of Projects have Students Completed in the Past?
The following are some examples of projects students completed in recent semesters:

- Measure the current state of customer satisfaction for a firm that provides translation / language services;
- Determine what modifications to a housing model may be necessary to ensure a nonprofit organization achieved its goal of housing chronically homeless individuals in NYC;
- Identify what prevents high school students in an economically disadvantaged neighborhood from being both physically and mentally present.

What Assignments are Related to this Project?
There are five assignments related to the Diagnostic Project (see pages 5-6 for more details):

1. Project Proposal
2. Data Collection Tool Design
3. Data Analysis
4. Data Feedback Plan and Presentation
5. Project Evaluation

What Support Will Consulting Groups Have?
Throughout the semester, time will be dedicated during our sessions to discuss issues that will inevitably come up as we work on the Diagnostic Project. Our class will become a "community of practice." That is, we will help each other solve problems we will run into. My role (both inside and outside of class) is to be a resource, coach, and collaborative learner. From beginning to end, I am available to assist your Consulting Group work though its project. ***Please do not hesitate to call or e-mail me with questions or concerns!***

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Course Overview

This course will meet over the following dates and times. The topics to be discussed during these sessions are also provided. This course is very interactive and client-focused. As a result, we may shift the topics around to meet the class' or our client's needs. In other words, we may not follow this "agenda" exactly as it is laid out here (but we will get to everything).

Class Location: 72 ***5th Ave (3rd Floor Conference Room)***

Session	Date/Time	Topics to be Discussed and Questions to be Answered
1	Saturday, 1/30 10-4 PM	- What is an Organizational Assessment and Diagnosis? - What does the A&D process look like? - What role do Consultants and Client play in an A&D? - What is Sponsorship and how will se secure sponsorship for our client work? - How will our Consulting Groups work together?
2	Tuesday, 2/9 6:00-8:50	- What is a contract? - How do we plan for a project?
3	Tuesday, 2/23 6:00-8:50	- How do we enable readiness (minimize resistance)? - How does data collection affect stakeholders?
4	Tuesday, 3/2 6:00-8:50	- What is a data collection plan, and what is involved with creating one? - What data collection tools are available and which ones should we use?
5	Saturday, 3/13 10-4 PM	- What does it take to devise good survey /focus group / interview questions? - How can we effectively implement / administer the data collection tools? - How can we enable readiness for data collection? When can we expect to run into resistance?

6	Tuesday, 3/23
	6:00-8:50
		- ***Qualitative Analysis:***
		  - What tools are available for interpreting the data collected?
		  - How do we analyze qualitative data (theme analysis)?

7	Tuesday, 4/6
	6:00-8:50
		- ***Quantitative Analysis:***
		  - What tools are available for interpreting the data collected?
		  - How do we analyze quantitative data?

8	Tuesday, 4/13 6:00-8:50	- How does data feedback enable change? - How can we create organizational readiness for the feedback process? - What is the goal of the Client Feedback Meeting, and how do we prepare for it?
9	Tuesday, 4/17 6:00-8:50	- Preparing for Client Feedback Meeting
	5/10 – 5/14	- Client Feedback Meetings – we will schedule these sessions as times convenient to us and our clients. The goal is to have all Client Feedback Meetings done by ***Friday, May 14th***.

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Course Readings

Chapters from a variety of different textbooks will be used throughout this course. Unless otherwise noted, these readings are required and should be read prior to the appropriate session. In a couple of cases some readings are identified as *recommended* – that is, they do not need to be read at all; however, they contain information that may be useful as you work on your projects or in the future.

1. Required Text

The text can be purchased from Barnes and Noble (or, check www.Alibris.com for a used/less expensive copy).

Nadler, David A., *Feedback and Organization Development: Using Data-Based Methods.* Reading, MA: Addison-Wesley, 1977

2. Reading Packet

The following readings have been placed on E-Reserve at the library:

1. Block, Peter, *Flawless Consulting.* San Diego, CA: San Diego, CA, Pfeiffer and Company, 1981
2. Boyatzsis, Richard E., "The Search for the Codable Moment - A Way of Seeing," *Transforming Qualitative Information*, Sage, 1998. pp. 1-16
3. Church, Allan H., Wacklawski, Janine, *Designing and Using Organizational Surveys: A Seven-Step Process.* San Francisco, CA: Jossey-Bass, 1998
4. Kayser, Thomas A., *Mining Group Gold.* El Segundo, CA: Serif Publishing, 1990
5. O'Connor, Joseph, McDermott, Ian, *The Art of Systems Thinking*. San Francisco, CA, Thorsons, 1997
6. Schein, Edgar H., *Process Consultation (volume 1).* Reading, MA: Addison-Wesley, 1988
7. Stewart, David, Shamdasani, Prem, and Rook, Dennis, *Focus Groups: Theory and Practice*, Thousand Oaks, CA, Sage, 2007
8. Weiss, Alan, *Organizational Consulting: How To Be An Effective Internal Change Agent.* Hoboken, NJ: John Wiley and Sons, 2003

3. Reading Schedule (FYI - this will be posted on Black Board and may change throughout the semester)

Topic	**Session**	**Required Readings**
Defining A&D and Systems Theory	1 & 2	Nadler (chapters 1-3) O'Connor, McDermott, (chapters 1-2)
Client/Consultant Relationship	1 & 2	Block (chapter 2) Schein (chapter 1)
Entry	3	Weiss (chapters 4-5) Block (chapter 4)
Resistance	4	Block (chapter 8)
Data Collection –Theory	4	Nadler (chapter 4) Nadler (chapter 6, pages 109-117)
Data Collection –Contract	5	Nadler (chapter 6, pages 109-117)
Data Collection –Surveys	6	Church, Wacklawski (chapters 1-2)
Data Collection – Focus Groups/Interviews	6	Stewart, Shamdasani, Rook (chapter 5)
Data Analysis – *Qualitative* Data	7	Stewart, Shamdasani, Rook (chapter 7)
Data Analysis – *Quantitative* Data	8	Church, Wacklawski (chapter 5)
Data Feedback	8 & 9	Nadler (chapter 8) Kayser (chapter 3)

Grading Policy and Academic Standards

1. Total Possible Points

A total of 100 points can be earned for this course. The following table illustrates how these 100 points are distributed. A student's final grade is determined by his/her group's performance, as well as his/her individual performance. We will discuss these items in greater detail during our first session. ***Please note that the point allocation might change slightly.***

Client-Related Work (70 points)	**Homework (15 points)**	**Participation (15 points)**
Group Assignments - Project Proposal (15 pts) - Data Collection Tool (20 pts) - Data Analysis Tool (15 pts) - Data Feedback Presentation (20 pts) ***Individual Assignment*** - Project Evaluation (20pts)	***Individual Assignment*** - Interviewing for Details (10 pts) - How the Act of Data Collection Affects an A&D (05 pts)	- In Class Participation (05 pts) - Consulting Group Member Evaluation (05 pts) - Interaction with Client (05 pts)

2. Point Scale

The following identifies how points translate into letter grades:

93 – 100	=	A
90 – 92	=	A -
87 – 89	=	B +
84 – 86	=	B
80 – 83	=	B -
77 – 79	=	C +
74 – 76	=	C
70 – 73	=	C -
69 or less	=	F

3. Incompletes

As outlined in the department's grading policy and academic standards policy, "A grade of 'I' (incomplete) is a temporary grade indicating failure to complete assigned work. The mark is given only upon the request of the student and at the discretion of the instructor. The student and faculty member must sign a completed 'Request for Grade of Incomplete Form' before the final class session. The 'I' must be removed within one year after the end of the semester in which the student received the grade. Students seeking an extension of this time limit must have the approval of the instructor and successfully petition the chair of their program. If no petition is made, or if the petition is unsuccessful, the grade is changed to an N – Permanent Incomplete – which remains on the student's permanent record."

Overview of Client Related Work (70 Points)

The detailed requirements for these assignments will be outlined at the appropriate time during the semester. The following provides a high-level overview of the assignments:

Project Proposal
When: *TBD (due date is client-dependent)*
Points: *15 points*

The Consulting Group will need to submit a Project Proposal (2-4 pages) that will be addressed to your client. The proposal will answer key questions, such as what is the project's overall purpose? What are the critical questions that need to be answered (in other words, what data will need to be collected)? And, what roles will clients and consultants need to play during this project?

Data Collection
When: *TBD (due date is client-dependent)*
Points: *20 points*

The Consulting Group will need to use a variety of data collection tools (for example, a survey, one-on-one interviews, or focus groups) in order to complete the Diagnostic Project. This assignment involves designing the data collection tool and the supporting materials.

Data Analysis
When: *TBD (due date is client-dependent)*
Points: *15 points*

This assignment involves administering the data collection tool, reviewing and organizing the data in a way so that the Consulting Group can begin to draw conclusions about what the data reveals.

Data Feedback Plan and Presentation
When: *TBD (due date is client-dependent)*
Points: *15 points*

Once the analysis phase has been completed, it will be time to feed back the data to the client. For this assignment, the Consulting Group will develop a Feedback Plan and Presentation to be shared with the Client during a Feedback Meeting.

Project Evaluation (Note: This is an individual project related to the group project)
When: *TBD (due date is client-dependent)*
Points: *20 points*

The purpose for this final assignment is to give each student the opportunity to ***individually*** reflect on the process of completing an organizational assessment and diagnosis. Specifically, students will be asked to examine how successful the Consulting Group's A&D project was (using criteria discussed in class). Students will need to answer questions such as: "Was the A&D successful?" "What factors contributed to the project's success", or "what could have been done differently to increase the likelihood of success?" Note: you may work in groups for this assignment.

Overview of Assignments –Homework (150 Points)

The detailed requirements for these assignments will be outlined at the appropriate time during the semester. The following provides a high-level overview of the assignments:

Interviewing for Details
When: Date TBD
Points: 10 points

This assignment involves interviewing three individuals (it can be anyone) on an agreed upon topic. The goal of this assignment is to practice probing skills and interviewing for critical details.

Data Collection is Not Neutral: How the Act of Data Collection Affects an A&D
When: Date is TBD
Points: 05 points

According to David Nadler, "data ***collection*** is not a neutral or benign act. It is an intervention into organizational life and therefore needs to be planned for and conducted carefully." (p. 117). This assignment involves the detailed examination of the way in which the acts of data collection influence whether or not an organizational assessment and diagnosis will be successful. Students need to identify what consultants should/must do to ensure that data collection will increase the likelihood of the A&D's success.

Overview of Participation (15 Points)

In-Class Participation
When: *Sessions 2 – 8*
Points: 05 points (final score will be the average of points earned in sessions 2-8)

Active participation in class discussions and activities is essential to make the learning experience valuable. As result, 05% of a student's final grade will reflect participation and involvement in class. A participation grade will be assigned for ***sessions 2-8***. Each session is worth five points. A student's final participation grade will be an average of the points earned during sessions 2-8. In general, a student's participation grade will reflect both the quality and the quantity of contributions to class discussions and the degree to which a student demonstrates that he/she is prepared for class discussions.

Consulting Group Feedback
When: *Date TBD*
Points : *05 points*

At the end of the semester, each member of a Consulting Group will receive feedback from his/her teammates. A survey instrument (to be designed by one of the Consulting Groups) will be used to solicit feedback on each student's individual contributions to the group's overall performance. The survey instrument will reflect the class' overall feelings about the important characteristics of an effective team member. More details about how these dimensions will be established will be discussed during our first session. ***Five percent (05%) of a student's final grade will reflect feedback received from their Consulting Group members via this survey.***

Interaction with Client
When: *Date TBD*
Points : *05 points*

During this class, each student should expect to interact with the client group in some way or another. This may take place during a face-to-face meeting, a telephone conference, or while collecting data from members of the client group. While no one is expected to attend every client meeting / interaction, each member of the consulting group will need to manage the interaction with the client while they are playing the role of co-facilitator. ***Five percent (05%) of a student's final grade will reflect the way in which this interaction was managed.***

Policies Regarding Group and Individual Assignments

1. **Submitting Assignments and Getting Back Grades**
   - Assignments are due on the dates / times identified. ***One point will be deducted from any assignment submitted after the due date/ time.***
   - Assignments will be submitted either via e-mail or Google Docs. I will confirm receipt of your assignment via e-mail within 24 hours of receiving it. ***I will not contact you to find out where your assignment is if it is not received by the due date / time.*** In other words, if you do not hear from me within 24 hours, you should assume that ***I have not received*** your assignment, and you should contact me ASAP.
   - Grades and comments about your assignments will be sent back to you electronically (either via Black Board, or Google Docs – depending on the assignment).

2. **Resubmitting Assignments**
   Assignments ***cannot be resubmitted*** to earn a better grade. Instead, opportunities to earn extra points may be provided. These opportunities will be announced to the entire class and those who are interested can participate.

3. **Group Assignment Grades**
   The same grade will be assigned to each member of the Consulting Group without exception.

4. **Assignments Not Submitted**
   Assignments not received *by the time final grades must be submitted* will receive zero points. ***Final grades will be submitted by Monday, May 24th .***

5. **Writing Style and Grammar**
   Students are assumed to have basic writing skills enabling them to communicate effectively about ideas relevant to the course. The course also assumes students are, or will quickly become, proficient in word-processing. All written assignments should be word-processed.

   Grades for written assignments will, in part, reflect your writing skills. That is, if your writing style and use of grammar interfere with your ability to convey your ideas clearly, your grade will be affected. Feedback is aimed to assist students to strengthen these skills. Students who wish to further improve their skills should consult the Graduate School Office about available resources and materials.

Attendance Policy

- **Missing Class:**
  - There may be times when you are late for class or need to leave early. Please be aware that for every hour of class missed, ***½ point will be deducted from your score for that session***. These points cannot be made up.
  - Missing an entire class will result in losing the possible participation points for that session. These points cannot be made up.

  - **NOTE:** Missing ***more than 7.0 hours of class (25% of class time)*** will affect a student's final grade ***(final grade may be lowered up to an entire letter grade).***
  - Exceptions will be made to this policy if you have a ***legitimate*** emergency or illness that prevents you from coming to class. If that is the case, please call me as soon as it is reasonably possible.

  - It is the student's responsibility to find out what material was covered during the time missed (I will happily meet outside of class about any missed content – it is the student's responsibility to arrange for a time to meet).

- ***Known Scheduling Conflicts:***
  - Given how group-focused this class is, your absence could possibly affect the way in which certain discussions / activities are organized. As a result, I request that students please make me aware of any known scheduling conflicts as soon as possible so that I can plan accordingly. *Thank for your assistance with this!*

Important Logistical Information

Location: 72 5th Ave (3rd Floor Conference Room)

SATURDAY CLASSES

Start Time:	10:00
End Time:	04:00
Lunch:	30 minutes (usually around 12:30)
Breaks:	In general, we will take a 10-15 minute break every 90 minutes
Food/Snack:	Feel free to bring whatever you need to get you through the day!

During the Winter Months. . .

Should snow or ice be in the forecast for some Tuesday evening or Saturday morning, I may be delayed getting into the city. If bad weather is expected, I will send out an e-mail around noon the day before to let you know that I may be delayed. In that case, please call my voicemail (860-733-5789) as outlined below. If I am delayed the outgoing message will tell you when class will start:

- On Saturday: Call my voicemail ***after 7:30 AM.***
- On Tuesday: Call my voicemail ***after 4:30 PM***