6-2001

A Systems Approach to Designing an Internship Model that Benefits the Sponsoring Organization

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A SYSTEMS APPROACH TO DESIGNING AN INTERNSHIP MODEL THAT BENEFITS THE SPONSORING ORGANIZATION

by

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A Dissertation
Submitted to the
Faculty of The Graduate College
in partial fulfillment of the
requirements for the
Degree of Doctor of Philosophy
Department of Psychology

Western Michigan University
Kalamazoo, Michigan
June 2001

ACKNOWLEDGMENTS

This dissertation project began ten years ago when I applied for admission to the Behavior Analysis program at the University of North Texas. Drs. Janet Ellis, Sigrid Glenn, Joel Greenspoon, and Cloyd Hyten showed me how behavior analysis can contribute to making this world a better place. I thank them for preparing me for a journey of exciting personal growth.

As I was finishing my studies at UNT, Dr. Richard Saunders from the University of Kansas gave a presentation on organizational performance systems. He opened my eyes to systems thinking with respect to organizational environments, human performance, and work life quality.

Several years later, Randolph D. Terronez, County Administrator of Kalamazoo County Government, allowed me to connect my theoretical knowledge of behavior analysis and human performance technology to the real-world of county government. His confidence in my abilities and the freedom he gave me made my internship successful and this dissertation possible.

My dissertation committee generously supported the applied nature of this project. Dr. Robert O. Brinkerhoff's guidance was essential in designing and evaluating the progressive consultative internship system. Dr. Alyce M. Dickinson accepted the practical methodology as an exception; I hope that she will not be

disappointed. Dr. Richard W. Malott provided the perspective and enthusiasm of someone who designed many successful performance systems.

Dr. Dale M. Brethower, my advisor and committee chair, taught me everything I know about human performance systems. His unique approach to instruction and advising prepared me for my consulting internship at Kalamazoo County Government and a professional career in helping others add value to their work lives. But Dale was more than an academic advisor: He was, and is, my role model for working successfully with other people.

Across the ocean my parents Helga and Jochen Dams and my brother Martin accompanied me on my scholarly journey. Over the years, as my letters home became fewer, their encouragement became stronger.

My son Martin Garrett was born when I began this project. I am looking forward to helping him become the best he can be.

Finally, I thank my wife Lisa Gayle, my best friend, for her unwavering support. Lisa's quiet patience, her unconditional love, and her exceptional cooking skills provided me with the strength needed to complete my graduate studies. Now I hope that I can fulfill my promise to her: that there really is a life after school.

Peter-Cornelius Dams

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CHAPTER I

INTRODUCTION

The Intern as Performance Consultant to Local Government: A New Internship Paradigm

Nearly 75% of today's college students participate in an internship prior to graduation. Only twenty years ago, that number was less than 3% (Oldman & Hamadeh, 1997). This increasingly large demand requires a corresponding supply of internship opportunities. Indeed, recent internship resources list thousands of such opportunities, ranging from 40,000 (Peterson's, 1997) to over 100,000 (Oldman & Hamadeh, 1998) national and international internship positions. The popularity of internships is due to the fact that internships provide multiple benefits to all parties involved. They are win-win situations for interns, sponsoring organizations, and educational institutions.

Students can find internship opportunities in almost all sectors and industries, such as business and technology, the arts, environmental organizations, human services, public affairs and research organizations (Oldman & Hamadeh, 1997, 1998; Peterson's, 1997). Government internships range from local units of government (Pierson, 1992) to internships at the White House (President of the U.S., 1992).

Internships: An Overview

Definition of Internships

The word "internship" can have several meanings. Oldman and Hamadeh (1998) point out that organizations may refer to internships as volunteer positions, fellowships, apprenticeships, or externships. Whatever the name, most authors define internships with respect to its purpose as an experiential learning opportunity (e.g., Ciofalo, 1992). For example, Sweitzer and King (1999) define internships as "experiences that involve receiving academic credit for working in a social service agency, or at some other site, for at least 8 hours per week over the course of a semester" (p. 3). For her qualitative research on internships, Taylor (1992) defines internships as "structured and career-relevant work experiences obtained by students prior to graduation from an academic program" (p. 52).

The present study adopts the definition suggested by the Task Force on Local Government Management Education (Task Force, 1992). The purpose of the task force was to develop guidelines for the education of local government managers. It stated that an internship "provides the critical opportunity to test and expand classroom learning under the guidance and teaching of a practitioner supervisor" (Task Force, 1992, p. 10). As will be shown in later chapters, the essential relevance of that definition for the present study lies with the testing and expanding of classroom learning; the supervisory role of the practitioner supervisor, however, will be modified (see chapter III).

Purpose of Internships

Most interns are college or university students. For example, Oldman and Hamadeh's (1997) America's Top Internships 1998 lists internships for undergraduates, graduate students, postgraduates, and even high-school students (see also Oldman & Hamadeh, 1998; Peterson's 1997). Pierson (1992) expands this view by suggesting that "anyone interested in learning more about local government could be a great intern," including "employees who want a rotational assignment/cross training and mid-career professionals" (p. 17).

Regardless of the educational level, the purpose of internships is to close the gap between theory and practice (e.g., Ciofalo, 1992; Filipczak, 1998; King, 1998; Sweitzer & King, 1999; Pierson, 1992; Task Force, 1992). John Dewey, one of America's prominent educators and proponent of experiential education noted that "An ounce of experience is better than a ton of theory simply because it is only in experience that any theory has vital and verifiable significance" (quoted in Sweitzer & King, 1999, p. 11). Murphy (1973a) suggests that public administration internships

> establish the transition between learning and practice, much in the manner of the medical internship. Transition is really the key to the creation of internships; the primary intent is to bridge the gap between academic and professional worlds for the fledgling administrator. (p. 3)

The Internship Bible (Oldman & Hamadeh, 1998) emphasizes this educational aspect in its listings as it includes only those internship programs that meet the following two criteria. First, programs have to be temporary; that is, they do not provide long-term positions for the intern. Second, internships should include

specific characteristics that distinguish them from staff positions, such as learning goals, mentoring or networking opportunities, intern meetings or seminars, and field trips or tours.

Benefits of Internships to Interns, Sponsoring Organizations, and Universities

Internships provide a number of benefits to the involved individuals and organizations, namely, interns, sponsors and their organizations, and universities. This section describes these benefits for each of these user groups.

Benefits to Interns

Internship benefits to interns fall into four categories: (1) learning experience, (2) financial benefits, (3) academic benefits, and (4) career benefits. Table 1 lists specific examples of these four types of internship benefits.

Table 1

Benefits of Internships to Interns

Benefit	Examples (Source)
Learning experience	Apply what was learned in school; improve and acquire skills; develop a relationship between theory and practice; catalyst for personal growth (Brickey, 1998; Ciofalo, 1992; Filipczak, 1998; Sweitzer & King, 1999; Task Force, 1992)

Table 1—Continued

Learning experience	Interpersonal communication (Pierson, 1992) Organizational management and politics (Pierson, 1992) Team and group dynamics; computer experience; tolerance in a diverse work environment (King, 1998; Pierson, 1992)
Financial benefits	Most industries have internships that compensate their interns generously (Oldman & Hamadeh, 1997) Supplement student loans or help cover tuition (Berger, 1992; Hanson, 1992)
Academic benefits	Ranges from no credit to credit required for graduation (Garrison, 1992; Madoch, 1992; Murphy, 1973a) Thesis or dissertation projects (Angell, 1987; Jones, R. D., 1995; Shabani, 1999)
Career benefits	Clarify career and educational goals (Murphy, 1973a; Sweitzer & King, 1999) Sample a company without committing for life (Oldman & Hamadeh, 1997) Less time spent job hunting (Henry, 1979) Receive more job offers and/or interview successfully for full-time work (Taylor, 1992) Full-time employment upon graduation (Madoch, 1992) On average higher starting salaries (Peterson's, 1997; Taylor, 1992) Networking opportunities for professional career (Oldman & Hamadeh, 1997, King, 1998; Henry, 1979; Pierson, 1992)

Intern Compensation. With respect to financial benefits, not all internships are created equal. Intern compensation ranges widely from no compensation at all to substantial salaries, stipends, or tuition reimbursement (Oldman & Hamadeh, 1997; Peterson's, 1997). Some companies even offer stock options, but with a catch: Interns have to return full-time to cash them in (Tanaka, Peraino, & Check, 2000). The following list based on Oldman and Hamadeh (1997) provides weekly salaries for full-time interns in some of the top paying programs: J. P. Morgan: $575, Abbott Laboratories: $625, Ford Motor Company: up to $775, Mattel, Inc.: up to $900, and Apple Computers: $1,250 depending on work experience and education. Some organizations pay graduate students more than undergraduates.

Although being paid is in the interest of the intern, providing some form of salary, wage, or stipend may also contribute to the quality of the intern's assignment. Murphy (1973a) suggests that sponsoring organizations should pay both full-time and part-time interns so they establish a greater interest in their interns' utilization (see also Task Force, 1992), rather than viewing them as free labor for menial tasks.

Disadvantages to Interns. Besides this wide range of benefits, internships may also involve some disadvantages. For example, Murphy (1973a) notes that full-time internships can prolong a student's formal schooling. In addition, internships can be costly if students have to travel or temporarily move closer to their sponsoring organization.

Not all interns may obtain higher-level jobs than non-interns. With respect to traditional measures of employment success such as number of supervised staff,

Henry (1979) found that 35% of former government interns did not have any supervisory responsibility, compared to 21% of non-interns. He also reported that 29% of previous interns supervised 100 or more staff compared to 26% of non-interns, an insignificant difference. Former government interns expressed less confidence and trust in their agencies and viewed government employees less favorably than government employees who did not intern in a government agency.

In summary, internships can be "a golden 'Wonka' ticket to career success" (Oldman & Hamadeh, 1997, p. xix). They provide interns with "a prime chance for career growth" (Murray, 1999, p. 36) as they increase their professional and interpersonal repertoire, develop informal networks, and gain practical experience.

Benefits to Sponsoring Organizations

Internships are not only attractive to students but also to sponsors who mentor, supervise, or coach interns in their organization. In particular, sponsors or their organizations benefit with respect to (1) recruitment, (2) productivity and cost, (3) intellectual resources, and (4) sponsor benefits. Table 2 lists specific examples of those benefit categories.

Disadvantages to Organizations. Filipczak (1998) noted that interns tend to not save an organization time in the short run because of the resources required to establish an internship program, and recruit, screen, interview, and train interns (see also Pierson, 1992). Sweitzer and King (1999) observed that supervising an intern is an "investment of time, and that time is lost for other agency activities" (p. 90). This

time is usually spent in developing the intern's job abilities, such as creative, strategic, interpersonal and editorial skills (Berger, 1992). However, if the investment pays off and the intern does a good job, everyone benefits, and the intern may even be able to take some of the work load off the supervisor (Sweitzer & King, 1999).

Table 2

Benefits of Internships to Sponsoring Organizations

Benefit	Examples (Source)
Recruitment benefits	Create a pool of talented and potential employees (Filipczak, 1998; King, 1998; Madoch, 1992; Murphy, 1973a; Pierson, 1992) Assess potential employee without a commitment (Tooley, 1997)
Productivity and cost benefits	Interns produce more than they cost relative to full-time employees (Greenberg, Cradock, Godbole, & Temkin, 1998; Schauble, Murphy, Cover-Person, & Archer, 1989) Cost about half as much as senior staff but clients may perceive intern service quality just as high (Schauble et al., 1989) Additional staff during staff shortage (Murphy, 1973a) New energy & enthusiasm; complete neglected projects and reports (Murphy, 1973a; Madoch, 1992) Part-time employees (Madoch, 1992) Positive effects on morale, commitment, and proficiency of staff (Sweitzer & King, 1999) Network of contacts with previous interns (Peterson's, 1997)

Table 2—Continued

Benefit	Examples (Source)
Intellectual resource	New ideas and fresh perspectives on challenges (Grand Valley State University, 1998; Murphy, 1973a; Pierson, 1992) Questioning some of the assumptions that insiders may be taken for granted or protecting for selfish reasons (Murphy, 1973a) Liaison between officials and governing boards (Murphy, 1973a) University becomes a resource because interns acquire and transmit the intellectual interest of their professors (Murphy, 1973a)
Sponsor benefits	Reduced workload (Sweitzer & King, 1999) Personal satisfaction of teaching and helping someone (Pierson, 1992) Sponsors may use relationship with faculty advisor to discuss personal career development (Murphy, 1973a) Sponsors who consistently use interns effectively may secure part-time teaching positions (Murphy, 1973a)

In summary, the benefits of sponsoring interns by far outweigh the cost. It seems that the greatest benefit to organizations are a pool of potential employees, and savings in money and time otherwise spent on recruiting, hiring, and training new staff. According to Peterson's (1997), "it is common to find companies hiring 80 to 90% of their interns for full-time positions after graduation" (p. 6).

Benefits to Universities

Universities, too, receive several benefits from internship programs. Murphy (1973a), who examined internships from a public administration and management perspective, noted that universities have benefited from "liberal injections of realism into formerly outdated lecture notes" (p. 3) and also from the suggestion of new opportunities for research. Furthermore, universities can mix theory and practice by having the opportunity to engage in a long-term research format that can yield insights that would not be open during brief research visits. Murphy further notes that internships may bring together administrators and professors for research cooperation. Snyder (1999) points out that universities may use internship programs as a marketing tool and to increase their tuition base because internship seminars cost less than traditional classes.

To summarize, internships provide tremendous potential for a win-win situation for student learning, organizational operations, and university programs. These benefits contribute to a rising number of internships in this country.

Performance Consulting Internships: An Untapped Opportunity

Despite the existence of over 100,000 internship positions in many different organizations, the internship literature fails to address how interns can provide benefits other than monetary, namely, by functioning as performance consultants to the interning organization. To date, consulting internship have received little attention.

For example, Stedman's (1997) recent review of two decades of literature from clinical and counseling psychology does not include a category on how interns may benefit the organization. Clinical and counseling psychology internships should not be an exception with respect to providing benefits to the interning organization, especially since counseling psychologists may very well find themselves in the role of organizational consultant for which an internship is a necessary educational experience (Leonard, 1977).

It seems that the typical benefits of internships to organizations described earlier are unintended but useful byproducts of academic learning. These byproducts make internships attractive enough to organizations so that they continue to create and sponsor entire internship programs. Interns, however, may offer additional benefits. They may be tapped as performance consultants and provide expertise otherwise not extant in the organization.

The remaining sections in this chapter develop and present a rationale for a consultative internship system in county government. The sections provide an overview of consulting, describe the increasing need for performance consulting in local government, and suggest how consulting internships in local government may benefit not only interns, organizations, and universities, but also the field of human performance technology. The chapter concludes with a brief outline of the proposed internship system that will be developed in chapters II and III.

Consulting: An Overview

Weiss (1998) defines consulting as bringing a "specialized expertise, content, behavior, skill, or other resource . . . that the client doesn't already possess . . . and that assists a client in improving the status quo" (pp. 3-4, emphasis added). Steele (1975) notes that consulting is aimed at "some improvement in the future functioning of the client system, rather than simply at getting the immediate task completed satisfactorily" (p. 3).

Typically, consultants provide their services for a fee. Holtz (1989) defines a consultant as "any individual or firm specializing in some field and providing counsel and/or related services in that field for payment . . . especially services the average executive needs in order to manage effectively" (p. vi; see also Bly, 1998; Boress, 1995; Goodstein, 1978; Gray, 1985; Greenbaum, 1990; Holtz, 1986; Shenson, 1990).

Shenson (1990) distinguishes two types of consulting: functional and process consulting. Functional consultants are specialists that apply their skills in a particular and unique environment, such as hospital critical-care facilities planners. Process consultants are generalists or multiple specialists who apply their skills in almost any setting, such as statisticians or systems analysts. Other process consultants include strategic planners (Weiss, 1998) and human performance technologists (e.g., Stolovitch & Keeps, 1999a).

Holtz (1989) provides three basic situations which indicate potential uses for consulting: problems that require highly specialized knowledge, skill, or experience for its solution, needs for a second opinion, and temporary work overloads that

requires additional technical or professional staff. Most of the consulting literature, however, addresses only the first situation: the need for highly-specialized expertise.

Benefits of Consulting

Weiss' (1998) first of ten basic consulting principles states that the "consultant will improve the client's condition" (p. 13). Benefits of consulting range from rearranged closet space in small apartments (Adler, 1999) to more efficient airline companies (Tosti, 2000). Performance improvement benefits include reduced training times, increased service speed, less waste, and faster product development cycle times (e.g., Esque & Patterson, 1998).

It is this primary focus on improving organizational performance that distinguishes consulting projects from internship projects. (Although clinical interns may improve the condition of their counseling clients, the present argument focuses on the role of the intern in improving performance of the sponsoring organization.) In other aspects, however, consulting and internships are similar: Both provide some function for an organization on a temporary basis, they apply a wide range of expertise in many different organizations, and, generally, receive some form of compensation or benefit. It may, therefore, only be a small step to place interns in a consulting role.

Consultative Internships

One example of a consultative internship can be found in Weigand, Richardson, and Weinberg (1999). They described how a sports psychology intern consulted with a college basketball team. In particular, the intern-consultant taught skills such as goal setting, relaxation training, and confidence building. Follow-up interviews indicated that the intern was perceived as competent and as responsive to the team's needs.

This psychology intern can be considered a consultant because the team utilized the intern in a temporary capacity as an external resource. The intern provided expertise not possessed by team members or coach and improved his clients' improved mental skills. Although performance improvement data (e.g., higher scores, increased number of wins) were not reported, it is suggested here that the sports psychology internship can be considered an example of consultative internships

Another example of a consultative internship was reported by Hise (1996). For over a year, an engineering firm needed to develop an in-house capability for electronic file sharing to exchange documents with its clients. Due to cost, management chose not to use their in-house engineering staff or outside consultants to develop this capability. Instead, the president hired the CEO's son who was looking for a summer job as a $10-per-hour intern to complete this assignment (it is not clear whether the son was a high-school or college student). After three weeks of online research, the intern recommended an Internet service provider with $25-a-

month unlimited full Internet service and one e-mail connection. The intern cost the engineering firm $1,280; less than the projected cost of a $75-per-hour consulting option explored earlier. Shortly after installing the file sharing system, the company won a $180,000 contract "because the customer's engineers were won over by the new [file sharing] capability" (Hise, 1996, p. 124).

These were the only examples of consultative internships reported in the literature. Both reports illustrated one-time internships with specific one-project assignments. The present study, on the other hand, attempts to design a long-term performance consulting internship system for county government; the system will allow interns to work on multiple projects across multiple internships.

The next section outlines the two major performance improvement approaches used by local government to respond to demands for change; it is followed by the suggestion to augment these approaches with consultative internships.

Performance Improvement Resources for Local Government: Internal Staff and Outside Consultants

The application of organizational development to public agencies was recommended more than thirty years ago (Golembiewski, 1969). Although the specific need for performance improvement in government has been recognized for many years (e.g., Brown & Murphy, 1970), agencies are only now addressing these issues with a heightened sense of urgency as they respond to four major change conditions.

Conditions Calling for Change in the Public Sector

Government agencies have no choice but to find ways to respond to the increasing demands for change. These demands for change at the local level are primarily driven by (1) citizens, (2) diminishing resources, (3) federal mandate, and (4) a constantly changing socio-economic environment.

Citizens. According to Walters (1998), the call for change is primarily driven by citizens. First, consumers are becoming more sophisticated with respect to the level of services they expect from government, based on their experiences with the service quality and speed in the private sector. Second, citizens call for accountability. They want to know what outcomes their tax dollars are buying, whether those outcomes involve tasty drinking water, smarter kids, welfare recipients brought to self-sufficiency, or a safer world. Fischer (1994) noted that "citizen's trust in government, and in government's ability to make a difference, keeps heading south. Something must be done" (p. 2).

Diminishing Resources. The demand for higher quality in government is accompanied by decreasing financial resources (e.g., Channing, 1999a; Escobar, 1999; Lefevre, 1992). Agency directors are struggling to use traditional ways of managing programs and budgets for the purpose of increasing those programs' effectiveness and efficiency (e.g., Cohen & Brand, 1993).

Federal Mandate. Recently, the Governmental Accounting Standards Board (GASB) ruled financial performance measurement a federal mandate (Berry, 1999). GASB requires that all states and localities report service efforts and

accomplishments (SEA), "accountant jargon for 'activities' and 'results,' or simply performance measurement" (Walters, 1998, p. 7). The Government Performance and Results Act of 1993 (GPRA or "Results Act") is the law which mandates this federal performance measurement initiative. Its effect can already be felt at the local level as some federal and state funding agencies require grantees to measure the performance of funded programs.

Changing Socio-Economic Environment. Local government officials have to adapt to ongoing changes in their region's population and economy. These changes affect local government in that they can strengthen or erode a community's tax base, and, thus, the level and types of municipal services.

For example, Kalamazoo County, Michigan, experienced a roller coaster ride of economic change in 2000. The closing of five paper mills in five months led to a loss of 1,370 jobs; a pharmaceutical company pulled over 200 employees from Kalamazoo County to its new world headquarters in New Jersey; the same company is appealing its personal and real estate property assessment which may lead to a $15 million loss in tax revenues; and one auto parts plant announced that its planned June 2001 closing will affect 375 workers (Jones, A., 2000a; Knape, 2001; "Paper company closings," 2001). The closing of one paper mill alone decreased the tax base of the City of Kalamazoo by $1.4 million; this loss will lead to increased sewer rates, canceled equipment upgrades, and unfilled staff positions (Allison, 2001a).

On the other hand, a new retail distribution center will create 900 jobs by 2002, with additional spin-off businesses expected to come to the area. In addition,

three other companies announced that local expansions will create more than 550 new jobs over the coming years (Jones, A., 2000a, 2000b).

These four conditions, citizens' demand for improved services, diminishing resources, federal mandate, and a changing socio-economic environment are impacting the way local government operates. But making changes quickly is often not possible in the public sector, due to a number of different constraints.

Conditions Constraining Change in the Public Sector

Local public sector organizations face a number constraints that impede their ability to change. Costello (1970), for example, lists seven conditions that can constrain change in municipal government:

1. Periodic changes in top leadership are more drastic and far reaching.

2. It is difficult to quantify the goal of municipal government, such as health services or police protection. In addition, its services are also less amenable to measurement than products of private enterprise.

3. The interests and values of local government's constituents are extremely heterogeneous. Citizens vary in age, education, health, socio-economic status, ethnic background, and interest in governmental activities. This heterogeneity can lead to delays and may change decisions into compromises.

4. Decisions are much more visible because of mass media scrutiny and competing political interests.

5. Local governments are creations of the state and have no powers except those explicitly granted to them. Their administration is dependent on federal, state, and local legislative bodies.

6. The recurring election process and the consequent need for early and highly visible gains increase the propensity for immediate and visible change, which often results in superficial and meaningless change efforts.

7. Going out of business is not an option for local government. Vested interests quickly build up around local programs. Pressures for their maintenance may become so strong that changes result in enlarging programs, rather substituting or eliminating programs that are no longer needed.

These factors impeding change in local government have essentially remained the same throughout the years (Knouse, 1992). The demand for change, however, has increased steadily. Government administrators and elected officials respond to demands for change by implementing performance improvement efforts with their own staff or with outside consultants (which often leads to a combination of both approaches).

Implementing Change With Internal Staff

At all levels of government, officials and staff are learning about and are implementing successful change processes (e.g., Cohen & Brand, 1993; Hatry, Gerhart, & Marshall, 1994; Lefevre, 1992). Often, this learning and implementation

occurs under mentoring from university professors (e.g., Cohen & Brand, 1993) or government researchers (e.g., Hatry et al., 1994).

Professional organizations are also supporting the performance improvement efforts of local public officials. For example, the National Association of County Administrators (NACo) and the International City/County Managers Association (ICMA) offer publications and Internet resources on performance measurement, quality improvement, and customer service. ICMA operates the Center for Performance Measurement to support performance measurement and benchmarking; city and county government agencies may join for an annual fee of $5,000. ICMA also publishes the journal Ideas in Action with real-world performance management examples from local government. The American Society for Quality's (ASQ) Public Sector Network provides information to its members that include published articles on general quality improvement topics and descriptions of specific improvement projects in local government.

The advantage of the internal approach to performance improvement is that it can be cost-effective and that staff have the opportunity to actively participate in the improvement initiative. The downside of the internal approach is that most staff do not have the expertise to conduct performance improvement projects and that learning about it can become an additional burden to already overworked staff. Hiring an outside consultant who recommends improvements and lays out an improvement plan to be implemented by internal staff is often another option for introducing change to a public sector organization.

Implementing Change with Outside Consultants

Many units of local government choose to work with outside consultants to improve organizational performance. Although some consultants specialize in working with government agencies, many performance consultants who work primarily with business and industry may not be prepared to intervene in local government. For example, Costello (1970) notes that effective change through legislative action is often highly unpredictable and requires "tactics totally different from those usually employed in effecting change in other organizations" (p. 17). Lovelace (1982) suggests that many external consultants are often under pressure to produce almost instantaneous results. Therefore, consultants tend to develop a standard operating procedure that functions as a framework for troubleshooting a client's problems. Some consultants apply this general framework directly to the situation without considering its specifics. In other words, "they are trying to force a round peg into a square hole" (Lovelace, 1982, p. 11). As a consequence, agencies may end up not implementing a consultants' recommendations (e.g., Denhardt & Denhardt, 1999).

The county government at which the author interned as Continuous Quality Improvement Coordinator provides an example of the difficulties of finding qualified performance improvement consultants. During the past years, several department heads and elected officials opted to implement continuous quality improvement (CQI) programs for strategic planning, communications training, team building, and process improvement. They repeatedly discovered, however, that many outside consultants

who were hired or interviewed were not able to adapt to the government system in ways that allowed them to effectively change the existing system (personal communications, L. Allen, November 15, 1999; L. Byrd, November 1, 1999; J. Gregart, July 23, 1999; B. Gregersen, October 8, 1999; A. Nieuwenhuis, August 9, 1999; E. Sharp, October 1, 1999; A. R. Vander Schie, December 19, 2000). As a result, some consultants were not used again, released from their contracts, or not hired at all.

Qualified public sector performance consultants may not only be hard to find, they can also be very expensive. Shenson (1990) noted that the 1989 median daily billing rate for consultants working in municipal government was $735. A recent request for a Kalamazoo County continuous quality improvement grant indicates that a local consultant charges $150 per hour to conduct strategic focus group sessions; a daily rate of $1,200 (Office of the Prosecuting Attorney, 2000). Earlier that year, the Kalamazoo County Board of Commissioners retained a national justice system consultant to monitor progress on the implementation of his improvement recommendations at the rate of $200 per hour; a daily rate of $1,600 (Kalamazoo County Board of Commissioners, May 16, 2000a).

It is suggested that the two general performance improvement approaches used by local government could be augmented by hiring interns with expertise in performance improvement. These interns may pursue graduate studies in organizational behavior management, human performance technology, organizational development, and related fields.

A Third Option: Consultative Internships in Local Government

The literature on local government internship focuses almost exclusively on acquainting public administration students with the realities of governmental service (e.g., Auth, 1992; Balutis, & Nunez, 1975; Henry, 1979; Murphy, 1973a; Pierson, 1992). In some cases, these interns may indirectly improve the performance of their agencies. Murphy (1973a), for example, suggests that interns may contribute to local government by questioning assumptions that insiders may take for granted or protect for selfish reasons. Interns may also become liaisons between officials and governing boards and "deliver messages and impressions that otherwise might be left unsaid and so left to grow into major problems. In this role the intern may make a contribution to the agency's responsiveness to citizens as well as to elected officials" (p. 9). Those benefits, however, are more or less side-effects of the intern's outsider perspective rather than anticipated or planned for internship outcomes.

Human performance technology (HPT) internships, on the other hand, can specifically provide assignments that cast interns in the role of performance consultants, thus combining the internal staff and outside consultant options described above. For example, one of the county officials whose experience with consultants was described earlier, used a doctoral intern specializing in human performance improvement and systems analysis to support his efforts in performance improvement. The student interned for two years in the Office of the Prosecuting Attorney (OPA) and introduced professional and clerical staff to cross-functional teams and process mapping (Nolan, 1997). The Prosecuting Attorney considered this

consultative internship an unqualified success (Appendix A). The Prosecuting Attorney continues to use and expand on the intern's work (personal communication, J. Gregart, July 23, 1999). In fact, Nolan's process mapping prompted the Prosecuting Attorney, who has been actively involved in performance improvement since the late 1970s, to invite the author to process map criminal case flow processes for the county's criminal justice system.

Potential Benefits of Consultative Internships in Local Government to Sponsoring Organizations, Universities, and Interns

Establishing HPT internships in local government may provide multiple benefits to government organizations, universities, and interns. In addition, the growing field of HPT may also benefit from this type of practical experience future consultants.

Benefits to the Sponsoring Government Organization. Officials in county government (and possibly other units of local government) would be able to utilize an almost untapped resource at low cost and create a pool of future external (or possibly internal) consultants who are prepared to assist them in meeting the challenges of change. Interns working closely with government staff may be able to transfer HPT as they teach staff to apply performance improvement and management tools.

Benefits to Universities. Universities may use these internships to recruit students. In addition, graduate students typically not involved with public agencies may find that government internships provide a rich source for thesis or dissertation projects.

Benefits to Interns. Interns will have the opportunity to apply human performance technology in a large public sector organization and to receive mentoring from public officials. This type of internship may allow graduates to position themselves as professionals with a special expertise not shared by many of their consulting colleagues and, possibly, launch a successful career in public sector performance consulting.

Potential Benefits to the Field of Human Performance Technology

HPT internships, however, may also be able to provide the field of human performance technology with a new generation of practitioners who have some insight into the intricacies of government systems. These practitioners may be able to fill a market niche for public sector consulting services.

The Field of Human Performance Technology. Human performance technology is an applied field of practice that attempts to improve the performance of individuals and organizations in systematic and reproducible ways (e.g., Brethower, 1995; International Society for Performance Improvement, 1999; Rummler & Brache, 1995; Stolovitch, Keeps, & Rodrigue, 1997). As a profession, HPT is relatively young; it did not make its appearance as a distinct field until the late 1960s (e.g., Dean & Ripley, 1997). HPT is based on a multidisciplinary research base that includes communications theory, human development theory, management theory, sociological theory, systems theory, and behavior analysis (Dean, 1997a; Stolovitch

and Keeps, 1999b). Its technology and areas of application are still evolving (Stolovitch et al, 1997). Mager (1999) describes the current state of HPT as follows:

> Nothing could be further from the truth than to . . . think that the [human performance] technology is now mature, that everything has been invented, that all the techniques have been honed to perfection, and that they have been applied to all applicable areas where they might conceivably improve performance. Nothing could be further from the truth. HPT is an evolving technology, and there's still much to learn, especially about how to disseminate the fruits of the technology to those who might benefit. For example, we still have yet to make much of a dent in the bureaucracy that passes the laws and makes the rules. . . . And we have yet to make a significant impact on those government agencies whose primary criterion for certification (and recertification) of competence in critical skills consists mainly of assessed . . . knowledge . . . and of counting the number of hours the student posteriors have been glued to classroom chairs. (p. xvii)

Based on the aforementioned demands facing the public sector, it is apparent that not only legislature and agencies involved in instruction and education can benefit from HPT, but government agencies in all areas and at all levels (e.g., Brand, Staelin, O'Brien, & Dickinson, 1982; Cohen & Brand, 1993; Lefevre, 1992; Walters, 1998).

Learning about HPT in the Public Sector. Established HPT practitioners can use different ways to prepare for working with the public sector. For example, they may read government and public administration literature, join local or national public sector groups, take additional graduate level coursework in public administration, or develop professional relationships with government officials.

Stolovitch and his colleagues (1997) note that one important aspect of the preparation and training of HPT practitioners includes university-guided practical experiences through hands-on projects. Graduate students in local government

internships could learn directly about performance improvement and change processes in the public sector. Consulting internships may not only provide the traditional benefits of merging classroom theory and practical application of tools and technology, they may also allow interns to develop a specialized consulting repertoire that positions them favorably in a growing consulting niche.

Fill a Market Niche. Future HPT practitioners with experience in applying human performance technology in local government could help the field of HPT to meet the needs of a growing market sector. This can be an important advantage in competing with other organizational consultants.

In summary, government agencies and human performance technologists can benefit from working together: Government agencies need expertise in finding ways to provide services more effectively and efficiently (e.g., Cohen & Brand, 1993; Lefevre, 1992; Walters, 1998). HPT consultants with a public sector background would be able to provide this expertise.

Designing a Consultative Internship System for County Government

The purpose of this dissertation is to design an internship system that will connect HPT graduate students and county government, and learning and consulting. The system attempts to make this connection by expanding the traditional role of internships through an internship system that is both consultative and progressive.

Consultative Internship

The proposed internship system will cast interns in the dual role of learner and consultant. Its purpose is to add value to both intern learning and organizational performance. Value added to interns' repertoire will not only be assessed based on intern learning and traditional measures of work behavior (e.g., completing assignments). Value added will also be measured by the intern's effectiveness in supporting the sponsoring organization's performance improvement efforts.

Progressive Internship

The current internship literature focuses on internships as isolated events, disconnected from internships that occurred before or that will occur later. That is, most interns are unaffected by the work of their predecessors. The proposed internship system attempts to connect intern learning and intern consulting in a progressive manner. Generally, progressive is defined as "continuing steadily by increments," relating to the notion of progress as "steady improvement of a society or civilization" (Morris, 1985, p. 950; emphasis added). It is not suggested here that interns in a progressive internship will incrementally improve the performance of a civilization; they are expected, however, to contribute to performance improvement of a smaller culture, namely, a county organization and its subsystems. A progressive internship will also enable interns to generate learning resources that contain relevant and up-to-date publications on performance improvement in (county) government. These learning resources will be of a progressive nature in that they will contain

increasingly specific and advanced materials. For example, initial material may contain publications of general topics such as orientation to performance improvement and performance measurement in county government; over time, interns will add specific topics that describe detailed facets of implementing performance improvement projects, such as how to teach process mapping or what to avoid when facilitating strategic planning sessions.

Using the term progressive in this context is more appropriate than using the term cumulative because cumulative does not imply improvement. Cumulative typically refers to "increasing or enlarging by successive addition" (Morris, 1985, p. 348). Certainly, a progressive internship will increase the number of performance improvement projects and the number of learning resources. This growth, however, will be guided by a systems thinking paradigm (e.g., Senge, 1994). Instead of merely increasing the number of performance improvement projects that may or may not be continued from one intern to the next, a progressive internship system will provide a framework for interns to contribute to organization-wide performance improvement by linking projects across individual internships and departments into a performance management system for the sponsoring county organization.

Chapter Summary

Internships provide students with a unique opportunity to link theoretical knowledge to practical experience. The growing number of internship positions reflects their value for interns, interning organizations, and educational institutions.

Traditional internships focus on student learning as the main measure of success. Organizations benefit from sponsoring interns in the form of low-cost staff and the opportunity to groom a pool of skilled job applicants.

The proposed design of a progressive consultative internship system within county government will broaden this traditional role of the intern. Specifically, such a system will enable interns to serve as internal performance consultants to local government across multiple individual internships. The following chapter describes the elements needed for developing this progressive consultative internship system.

CHAPTER II

GUIDELINES FOR DESIGNING A PROGRESSIVE CONSULTATIVE INTERNSHIP SYSTEM

This chapter develops guidelines for designing a progressive consultative internship system. It uses internship literatures, external and internal consulting literatures, and behavioral systems analysis to extract elements of successful internship and successful consulting. It closes by providing a systems analysis framework for designing a progressive consultative internship system.

At first glance, the large number elements of successful internships and successful consulting described in the various literatures seem to be a disconnected amalgamation of recommendations, ranging from learning expectations and contracts to communication skills and the desire to succeed. One way to make sense out of these recommendations is to arrange them into a logical behavior-based system that organizes these elements as they relate to different aspects of an internship's performance support system.

A Behavior-Based System for Organizing Elements of Successful Internships and Successful Consulting

The "basic principle of behavior" (Brethower, 1995, p. 30) states that performance is the result of two types of variables: what the performer brings to the workplace (e.g., knowledge, skills, attitudes, and abilities) and what the workplace

environment provides (e.g., direction, tools, incentives, and feedback). This principle is the conceptual basis for understanding performance as a system, such as the behavior engineering model (Gilbert, 1982, 1996) and the similar human performance system (Rummler & Brache, 1995). This chapter uses Gilbert's behavior engineering model (BEM) as the system for organizing elements of successful internships and consulting performance.

The Behavior Engineering Model

The behavior engineering model (Gilbert, 1982, 1996) distinguishes between environmental and performer variables that need to be in place to generate and maintain effective performance. Gilbert further subdivides the environmental and performer variables into information (before performance), instrumentation (during performance), and motivation (after performance) for a total of six cells. Brethower (1997) observes that "Performance deficiencies occur when there are deficiencies in variables related to one or more of the items in the six cells . . . . Likewise, these variables are necessary for successful performance support" (p. 17). Table 3 lists general elements for successful performance support, based on the behavior engineering model.

Elements of Successful Internships

Successful internships are internships in which intern performance meets the goals of the intern, the interning organization, and the university, thus providing some

or all of the benefits stated in chapter I. Table 4 lists elements of successful internships as suggested by the internship literature. The elements are classified according to the categories in Table 3.

Table 3

General Elements for Successful Performance Support
(based on Brethower [1997] and Gilbert [1996])

	Before performance	During performance	After performance
Organization	Work design & guidance	Tools and materials	Products, results, goals, incentives
	Instructions and feedback Work processes and procedures Information to link performance to goals, incentives, motives, or values.	Regular or special tooling Materials consumed during the performance Job aids, software programs, etc.	Regular or special incentives, rewards, or punishment Special goals or objectives Variables relevant to direction.
Performer	Knowledge, skills, and attitudes	Capacity and abilities	Motives and values
	The know-what, know-how, and know-why that enable performance to occur	The physical and intellectual capacities required for performance	Variables related to the acceptance or rejection of goals and incentives

Table 4

Elements of Successful Internships

	Internship elements
Organization: Work design & guidance	Clear performance expectations for both intern and organization in the form of a learning contract (Berger, 1992; Heimovics, 1973; Peterson's, 1997; Sweitzer & King, 1999; Tooley, 1997) Orientation to organization (Ames, 1992) Internship handbooks and/or seminars; evaluation and feedback (Auth, 1992; Sweitzer & King, 1999)
Organization: Tools and materials	Faculty support (Ames, 1992; Murphy, 1973a; Sweitzer & King, 1999) Top management commitment (Ames, 1992; Murphy, 1973c; Pierson, 1992) Principals of the firm must be available to supervise and teach (Berger, 1992) Access to top-level decision or overview of the organization (Murphy, 1973a) Broad projects, challenging work assignments, and exposure to agency operations (Gabris & Mitchell, 1992) Staff support (Ames, 1992) Rotation through different departments (Brickey, 1998; Gabris & Mitchell, 1992) . . . but only if relearning of basic tasks is not required (Murphy, 1973a)

Table 4—Continued

	Internship elements
Organization: Products, results, goals, incentives	Payment (Berger, 1992; Hanson, 1992; Murphy, 1973a; Task Force, 1992) Offer intern a job, view intern as resource rather than nuisance, periodic question-and-answer sessions with managers and faculty, interns know that product will be shown to key managers, stipend contingent upon successful program completion (Ames, 1992)
Performer: Knowledge, skills, and attitudes	Effective interpersonal skills (Gabris & Mitchell, 1992; Murphy, 1973a; Peterson's 1997; Pierson, 1992; Snyder, 1999) Strong writing skills (Pierson, 1992) Work experience in field or similar field (Murphy, 1973a; Peterson's 1997; Pierson, 1992) Applicable coursework and high grades (Ames, 1992; Murphy, 1973a; Peterson's 1997; Pierson, 1992) Outgoing nature (Balutis & Nunez, 1975) Leadership experience (Pierson, 1992)
Performer: Abilities	Understands the sponsoring organization and the intern as interacting systems (Murphy, 1973a; Sweitzer & King, 1999) Works with computers (Pierson, 1992) Maintains confidentiality (Murphy, 1973c)

Table 4—Continued

	Internship elements
Performer: Motives and values	Winning attitude, desire to succeed (Murphy, 1973a; Oldman & Hamadeh, 1997; Peterson's 1997; Pierson, 1992) Works well with minimal supervision (Pierson, 1992) Interest in area of internship or willingness to learn (Ames, 1992; Balutis & Nunez, 1975; Peterson's 1997; Pierson, 1992) Motivated to work independently (Balutis & Nunez, 1975)

Potential Pitfalls in Government Internships

Because the proposed internship system will be designed for county government, it may be helpful to review potential sources of problems that may be encountered by students new to government. Murphy (1973c) lists common "pitfalls" (p. 35) with respect to public sector internships, categorized into organizational, personal, and political pitfalls. This classification is similar to the behavior engineering model's organization and performer dichotomy; in addition, he takes into account the political nature of government internships.

Organizational Pitfalls. Organizational pitfalls can occur when the interning agency is not fully committed to accept interns. For example, projects that have not found conclusion over long periods of time may be assigned to interns based on the assumption that "a 'fresh' examination will encourage new solutions to long-standing problems. Naturally, this approach usually proves fallacious as interns run into the

same organizational barriers that have prevented solutions in the past" (Murphy, 1973c, p. 41). Furthermore, interns may experience a "division of loyalties" because they can only work part-time yet have to complete both work assignments and academic work. Part time internships could also lead to a perceived lack of dependability since interns may miss occasional meetings or informal gatherings.

Berger (1992) notes that interns most often complain about working under pressure, juggling too many tasks, or doing secretarial work. In case of the latter, Berger suggests the following decision rule: If menial work is done by other staff in the work area, then the complaint is not legitimate.

Personal Pitfalls. Personal pitfalls include the "fatal mistake" (Murphy, 1973c, p. 44) of not being able to discern the sponsor's communication, either clear or subtle, with respect to confidence or feedback. With respect to confidence, Murphy (1973c) notes that many public agency supervisors fear that outsiders will make detailed observations of their operations, and that these observations may lead to unfavorable publicity concerning perceived errors in procedures, criteria, and values which only an insider can fully interpret. Supervisory feedback may be misunderstood by interns because they may not comprehend messages couched as hints or other unclear signals. Finally, overconfident or arrogant interns who assume the role of "Mr. Big From the Front Office" (Murphy, 1973c, p. 45) may experience closed doors and little support from both sponsor and co-workers.

Political Pitfalls. These pitfalls occur when political interests overpower administrative interests and interns get caught in the middle of the power struggle.

For example, interns may be assigned to projects for which appointed and elected officials have competing goals. Similarly, if interns work only with elected officials they will view government from this one perspective; the same may occur when interns have contact only with administrative staff.

Murphy (1973c) concludes that situations perceived as pitfalls do not signal the end of an internship. Instead, they should be viewed as learning opportunities because "if there were no pitfalls in governmental organizations, innovative people would probably not be interested in working in government and there would be little need for internship programs or internship professors" (p. 47).

In summary, many authors describe in detail that successful internship performance is a function of both organizational and personal variables. Organizational variables include contracts, top management support, challenging assignments, adequate pay, and job offers. Interns should have a repertoire of interpersonal and technical skills and be motivated to work independently.

As noted in the previous chapter, the internship literature is only now beginning to address the role of interns as performance consultants. It was suggested that performance consulting interns could be a resource that supports local government in implementing performance improvement interventions. The next section examines which elements are needed for successful consulting.

Elements of Successful Consulting

The consulting literature is rich with advice on what it takes to be successful in the consulting business. For example, Weiss (1998) links his advice to monetary incentives in his Ten Basic Principles of Million Dollar Consulting. Table 5 lists elements common to successful consulting performance, independent of the consultant's area of expertise or the type of client organization.

Table 5

Elements of Successful Consulting

	Consulting elements
Organization: Work design & guidance	Contracts (Gray, 1985; Holtz, 1986, 1989; Mitchell, 1998; Weiss, 1998) Stating the collaborative nature of the relationship (Goodstein, 1978)
Organization: Tools and materials	Top management support (Kaplan & Norton, 1996; Rummler & Brache, 1995) Create an implementation team (Dormant, 1999; Gray 1985) Progress reports (Mitchell, 1998) Trust and respect of client personnel (Gray, 1985) Technology (Mitchell, 1998; Weiss, 1998)

Table 5—Continued

	Consulting elements
Organization: Products, results, goals, incentives	Fees, future projects with same clients, referrals (Bly, 1998; Gray, 1985; Greenbaum, 1990; Weiss, 1998)
Performer: Knowledge, skills, and attitudes	Marketing and sales skills (Greenbaum, 1990; Weiss, 1998) Interpersonal relationship skills (Block, 2000; Gray, 1985; Weiss, 1998) Professional etiquette and courtesy, integrity, engender trust (Gray, 1985) Strong analytical or problem-solving ability (Gray, 1985; Greenbaum, 1990; Holtz, 1989) Communicate and persuade in oral, written, and graphic formats (Gray, 1985; Greenbaum, 1990; Holtz, 1989; Mitchell, 1998) Listening skills (Boress, 1995; Weiss, 1998) Technical knowledge of business (Gray, 1985; Mitchell, 1998) Positive and optimistic (Boress, 1995) Honesty and ethics (Greenbaum, 1990; Weiss, 1998)
Performer: Abilities	Intellectual competence, orientation toward the people aspect of problems (Gray, 1985) Project management and time management (Bly, 1998; Greenbaum, 1990; Mitchell, 1998) Confidentiality (Mitchell, 1998)

Table 5—Continued

	Consulting elements
Performer: Motives and values	Enjoy work and people (Boress, 1995) Perseverance, desire to succeed (Greenbaum, 1990) Satisfaction with work independent of people's opinions (Gray, 1985; Greenbaum, 1990) Self-confidence (Gray, 1985)

The number of performer-related elements far outweigh the number of organizational elements. In fact, many how-to consulting books focus predominantly on the consultant's personal skills, which are called "attributes" (Gray, 1985), "competencies" (Weiss, 1998), and "universal traits" (Boress, 1995). This focus on consultants' personal repertoire is not surprising considering that their livelihood depends foremost on the ability to work with other people. For example, Dormant (1999) stated that personal skills are critical for HPT consultants in order to get "other people to accept change" (p. 257; see also Block, 2000). Weiss (1998) counsels his readers as follows: "If you learn nothing else from this book, heed only this. Consulting is a relationship business. A special product might make you competitive. Differentiated services may make you distinct. But only carefully crafted relationships will create a breakthrough firm" (p. 59, emphasis in original). This importance of relationship building is also emphasized in the internship literature.

Therefore, the design of the proposed internship system will have to address relationship building from the perspective of consulting interns.

Skills for Human Performance Consultants

The above section outlined general consulting skills needed by most consultants in most client settings. Stolovitch et al. (1997) specify basic skills and competencies for HPT professionals that overlap and expand the general consulting skills described before. Stolovitch and his colleagues categorize these skills as technical skills and people skills. Technical skills include analysis skills, observation skills, and design skills (i.e., creativity, logical thinking, and media knowledge). People skills include management skills (i.e., organizational and project management) and communication and interpersonal skills. Figure 1 summarizes these skills and competencies in the order suggested by Stolovitch et al. (1997).

In summary, successful internship performance and successful consulting share many variables at the organizational and performer levels. The proposed internship system design must include a framework for supporting these skills and competencies.

Interns as Internal Consultants

Despite the many requisites for success shared by consultants and interns, consultants differ from interns in three ways. First, consultants' primary goal is to improve their clients' situation; interns' primary goal is to gain practical experience.

HPT Skill/Competency Requirements	Basic skill group				
	Analysis	Observation	Design	Management	Communication
Determine projects appropriate for HPT	●	●			
Conduct needs assessments/front-end analyses	●				
Assesses performer characteristics	●	●			
Analyze the structural characteristics of jobs, tasks, and content.	●				
Write statements of HPT intervention outcome	●				●
Analyze the characteristics of a setting (learning/work environment)	●	●			
Sequence performance intervention outcomes			●		
Specify performance intervention strategies			●		
Sequence performance improvement activities			●		
Determine the resources (e.g., media, money, people) appropriate to the performance improvement activities and create all components			●	●	
Evaluate HPT intervention				●	
Create HPT intervention, implementation, monitoring and maintenance plan			●		
Plan, manage, and monitor HPT projects				●	
Communicate effectively in visual, oral, and written form					●
Demonstrate appropriate interpersonal, group process and consulting behaviors					●
Promote HPT as a major approach to achieving desired human performance results in organizations					●

Figure 1. Basic Human Performance Technology Skills and Competencies. (based on Stolovitch, Keeps, & Rodrigue, 1997).

Second, consultants' livelihoods depend on generating more successful than unsuccessful outcomes; interns' compensation may or may not support them during their internship. Finally, most consultants are clearly external or internal to their

client organization; interns are both: outsiders who become temporary members of their sponsoring organization.

The proposed internship system design must acknowledge the intern's dual role as external and internal consultant. The following section outlines specific elements of internal consulting that should also be considered in designing a consultative internship.

Purpose of Internal Consulting

Dekom (1969) observes that as "consulting firms have proved their worth, more and more companies have established internal consulting units to make expert knowledge and services available economically throughout the organization" (p. 5, emphasis in original). Lovelace (1982) defines the internal consultant as a "manager who develops models in order to identify the critical elements that must be considered to attain a given goal . . . he [sic] specializes in managing systems in general" (pp. 6-7).

The primary purpose of internal consulting is "to assist the organization in its self-evaluation so that available resources will be used more effectively" (Dekom, 1969, p. 17). Thus, internal consultants attempt to increase the effectiveness and efficiency of both managers and employees (Lovelace, 1982), and they can do so at a lower cost than most external consultants (Dekom, 1969).

According to Steele (1982), the internal consultant achieves this purpose by assuming three different roles, namely an expert role, a resource role, and a process

role (see also Thomas & Elbeik, 1996). Note that the term "client" refers to staff of the internal consultant's own organization.

Expert Role. The internal consultant assumes responsibility for diagnosing and solving a problem (e.g., information systems experts, engineers, physicians). This role is most useful when the client is dealing with a new and unfamiliar problem or does not have the expertise to do so.

Resource Role. The internal consultant helps the client to diagnose and solve problem, rather than doing it for them. The decision to act or not to act rests with the client (e.g., investment analysts, health and safety specialists, management consultants). The internal consultant may provide questions, suggestions, or additional information and alternatives.

Process Role. In the process role, the internal consultant seeks information from clients and focuses on how the work gets done. The purpose is to help clients recognize, define, diagnose, and solve the problem independently by questioning why staff are using certain approaches. They may also suggest consequences for a particular action or non-action. Interns in a consultative internship system may assume any one or all of these roles during their internship.

Elements of Effective Internal Consulting

As one may expect, there is a large degree of overlap between variables that support effective external consulting and those that support effective internal consulting. For example, both require clear specifications of the consultant-client

relationship, top management support, and the consultant's technical expertise combined with an ability to relate to and work with other people. Here, too, interpersonal communication skills are critical. Steele (1982) points out that "our most immediate effects often hinge on how well we influence people face-to-face" (p. 84).

Pitfalls of Internal Consulting

The worst that can happen to external consultants after completing an unsuccessful project is that they may lose that client and, possibly, referrals to future clients. Internal consultants, on the other hand, face different consequences because they are members of the same organization as their clients. Internal consultants who do not deliver as promised or alienate members in their organization, may find their support in the organization eroding which, in the worst case, may cost them their job. Lovelace (1982) provides the following list with the most common pitfalls for internal consultants:

1. Continuous long-term tasks that take over day-to-day operations interfere with the consultant's ability to quickly respond to other's problems;
2. Offering spontaneous opinions without reflection;
3. Accepting assignments for which the consultant is not qualified;
4. Lack of professional confidentiality;
5. Being secretive with their own staff;
6. Demeaning the efforts of others and being perceived as a "show-off;"

7. Creating confrontations;
8. Complaining or whining; and
9. Being emotionally unpredictable.

Steele's (1982) list of "consultant actions that irritate clients" (p. 50) describes a similar list of possible pitfalls. (These pitfalls may apply to external consultants as well.)

Consulting Interns: Outsider, Insider, or Both?

Interns play a hybrid role that falls between that of an external and internal consultant. No clear and hard delineation between those two roles exists; therefore, the internship model needs to be sensitive to the characteristics of both. Table 6 provides examples of advantages and disadvantages of internal and external consulting.

Table 6 refers internal consultants' advantage that their work and experiences are continuous with respect to the client organization. That is, internal consultants do not have to familiarize themselves with their clients' organizational culture—both formal and informal. The progressive nature of the proposed internship system design should incorporate means by which this continuity can be maintained across individual internships.

Table 6

Advantages and Disadvantages of External and Internal Consulting
(Based on Steele, 1982)

	Advantages	Disadvantages
Internal consulting	Job security Information about the organization Image as an insider Continuity of work and experiences	Accessible to clients at all times Dependence on one organization Image as an insider
External consulting	Outsider image Does not depend on one organization Clearer separation from client Clearer contracts	Lack of connection to client system Distance from the client

Behavioral Systems Analysis: A Framework for Designing a Progressive Consultative Internship System

Internship and consulting literatures alike emphasize the importance of understanding the role of the intern and the consultant as part of an overall system. Murphy (1973a) writes about government internships that "one of the most vital insights the intern can develop is an understanding of how the whole organization fits

together as a working system" (p. 14; see also Black, 1970). Sweitzer and King (1999), too, encourage interns to view their placement site as a system:

> It is important to realize that all systems are hierarchical. This does not mean that they use a hierarchical authority structure; some systems do not. But each system is part of a larger system, and most can be broken down into smaller systems. A family services center, for example, can be broken down into the various programs it runs. However, it is also part of a system of service providers in the city or town in which it operates. (p. 107)

Lovelace (1982) notes that internal consultants should be familiar with the integration of subsystems into total systems, subsystem development and evaluation, to provide them with a "big picture orientation" (p. 13). Steele (1982) suggests that internal consultants should understand "system dynamics . . . for two reasons: because they act in ways which influence that system, and because they are members of the system which provides the context in which they function" (p. 31, emphasis in original).

From the perspective of the external consultant, Goodstein (1978) remarks that consultants need a good theory of organizations to guide their search for data that help them understand and solve organizational problems. He considers systems theory as the most complete theory for understanding organizations.

If understanding systems is so critical to successful consulting and successful internships, then it seems to follow that designing a successful consultative internship system should be based on a systems thinking framework (Brethower & Dams, 1999; Senge, 1994). The present design of the proposed internship system is grounded in behavioral systems analysis. Behavioral systems analysis is based on general systems

theory and behavior analysis and forms a "knowledge base for human performance technology" (Brethower, 1999, p. 67).

Brethower (1999) notes that the behavioral systems knowledge base supports powerful methods for designing instructional systems and performance management systems that effectively improve individual and organizational performance. It also enables people to learn effectively both on and off the job. By connecting the interests of individuals, groups, and organizations, behavioral systems analysis supports the achievement of results that benefit the individual, the organization, and the customer. Malott, Vunovich, Boettcher, and Groeger (1995) describe the difference of behavioral systems analysis to other systems analysis and its unique advantage as follows:

> What distinguishes behavioral systems analysis from any other systems analysis is not just that it deals with systems of human behavior, but also that a good practitioner is uniquely sensitive to the crucial role the failure of human performance plays in the failure of organizations to accomplish their goals. Furthermore, we are uniquely prepared to design the performance management contingencies needed to improve that lagging human performance. (p. 346)

A consultative internship system based on behavioral systems analysis must include behavioral performance management contingencies that effectively support interns in both learning and consulting and sponsor and faculty advisor in mentoring the intern. Behavioral systems analysis provides a particularly appropriate framework for setting up such behavioral contingencies because it is based on the principles of behavior analysis and general systems theory.

Behavior Analysis

Behavior analysis sets itself apart from traditional theories of behavior in that it explains the causes of behavior without relying on unobservable hypothetical constructs. Instead, it focuses strictly on observable events and behavior (e.g., Catania, 1992; Skinner, 1938, 1953, 1971). Behavior analysis is built upon a scientific research base that provides evidence that human and non-human operant behavior (i.e., behavior that operates on the environment as opposed to reflexive behavior that is an automatic uncontrolled response to a stimulus) is a function of two environmental events: establishing operations and the consequences of behavior.

Establishing Operations. Behavior analysts postulate that behavior is motivated by establishing operations such as satiation, deprivation, and aversive stimulation (e.g., Keller & Schoenfeld, 1950; Michael, 1993; Skinner, 1953). These establishing operations have a motivative function in that they increase the effectiveness of a behavioral consequence as a reinforcer (or punisher) and evoke those behaviors that in the past produced those reinforcers (or avoided those punishers). For example, food deprivation increases the effectiveness of food as a reinforcer and evokes those types of behavior that in the past produced food. People are motivated to eat when they have not eaten in a while, and they behave in ways that in the past have led to the ingestion of food: microwaving a TV dinner, ordering food at the diner, or raiding Mom's kitchen.

Most organizations today do not use food deprivation or aversive stimulation to motivate people. Analogs to establishing operations in organizational settings

include goal setting, management support of new programs or initiatives, and career development (Agnew, 1998).

The proposed internship system must provide analogs to establishing operations that establish short- and long-term outcomes with reinforcing value for the systems' users. It also has to provide guidance that allows the users to engage in behaviors necessary to generate these outcomes through successful system planning, implementation, and maintenance.

Consequences. The second major determinant of behavior is the consequences that result from an organism's actions. The consequences of behavior determine if in the future people repeat a specific behavior in a specific environment. HPT practitioners know that "performance will continue if and only if it leads to something valued by the performer" (Brethower, 1995, p. 30; see also Komaki & Collins, 1982; Komaki, Desselles, & Bowman, 1989). Consequences valued by the performer are, typically, specific positive reinforcers that maintain or increase performance (e.g., Daniels, 1989, 1994; Gilbert, 1996; Hopkins & Sears, 1982; Komaki, 1986; O'Brien, Dickinson, & Rosow, 1982). Positive reinforcers used by organizations for rewarding good performance include feedback or public announcements about progress toward goals, promotion, pay raises, cash, or perks such frequent flyer coupons (e.g., Komaki, Coombs, & Schepman, 1991).

The proposed internship system must include consequences that maintain the users' behavior. Most likely, these consequences will consist not of tangible items (except, possibly, the intern's pay) but of signs of progress toward performance

improvement and successful intern learning. The internship system must provide a means for users to determine if these valued consequences are occurring.

General Systems Theory

Brethower (1999) states that general systems theory provides "basic concepts that integrate ideas from many different disciplines and subdisciplines that are relevant to HPT" (p. 68). The following section provides an overview of general systems theory because it will provide the framework for designing the proposed internship model system.

Definition of a System. Aristotle stated that the "whole is more than the sum of its parts," a definition of the basic system problem that is still valid in modern times (quoted in Bertalanffy, 1975, p. 149). A system's parts (or elements or subsystems) do not exist in isolation but interact with and relate to each other (Bertalanffy, 1968; J. Miller, 1978). The systems of interest to human performance technologists are individuals, groups, and organizations, often referred to as performance systems (e.g., Rummler & Brache, 1995).

General Systems Principles. Brethower (1999) identifies seven general systems principles that can be used to learn fundamental things about an organization. Table 7 shows how these principles may apply to the design of the proposed internship system. Many HPT practitioners utilize these principles in the form of performance system models that help them understand the performance of both individual performers and complex organizations.

Table 7

Relevance of General Systems Principles for the Design of a Progressive Consultative Internship System (based on Brethower, 1999)

General systems principle	Relevance to design of consultative internship system
1. Open systems	What energy/resources are needed to keep the internship going? How can the internship system obtain those resources?
2. Information processing	What information is needed to understand the internship in its context? The organization?
3. Guided systems	What are the goals that guide the internship with respect to learning? What are goals with respect to the interns role in the organizational change effort?
4. Adaptive systems	How can the intern react to changes in the environment?
5. Channeling energy	How does the intern channel energy? What are priorities? For the intern? For the organization?
6. Environmental intelligence	What information is needed to guide the intern? Are feedback and performance support systems in place?
7. Subsystem maximization	Does the intern's learning goal align with the organization's performance improvement goal? How can the intern balance learning and consulting? What does it mean to have a successful internship?

In summary, behavior analysis provides a framework for providing contingencies that motivate and maintain individual users' behavior. General systems theory provides a framework for designing a performance support system that provides the establishing operations and consequences for successful planning, implementation, and maintenance of the consultative internship system.

Models of Performance Systems

The purpose of performance system models is to provide "guidance in identifying, discussing, and improving key features of an organization" (Brethower, 1995, p. 29). They enable performance analysts and their clients "to understand the variables that influence performance and to adjust the variables so that performance is improved on a sustained basis" (Rummler & Brache, 1995, p. 14). System models allow people to "view performance from the same vantage point and to evaluate performance with respect to its context and purpose" (Gilbert, 1996, p. 116). In short, performance system models can be used to "describe, diagram, explain, administer, measure, and improve work" (Langdon, 1995, p. 12).

Brethower and Dams (1999) identified seven important performance systems models, six of which were developed by HPT pioneers. They note that these systems models show highly similar and, in some cases, identical properties. They conclude that "because the models have zero points of conflict with respect to their recommendations, we feel that each model can help you address critical systems issues" (p. 50). The author selected Brethower's (1972, 1982, 1995) total

performance system as a model for guiding the design of a progressive consultative internship system.

The Total Performance System

The total performance system blends principles of general systems theory with principles of behavior analysis into a unique model for behavioral systems analysis. It is, therefore, well suited as a framework for designing a progressive consultative internship system and its performance support processes.

Elements of the Total Performance System. G. A. Miller (1956) posited that people cannot grasp more than "seven, plus or minus two," concepts simultaneously. With respect to performance consulting, Brethower (1982) notes that "We need a lot of information and we need just the right information. We need it organized into a coherent picture containing about seven items" (p. 358). Figure 2 shows the total performance system and its seven elements, Table 8 describes these elements in detail. Note that Figure 2 shows the receiving system with a bite taken out to illustrate that it is almost impossible to completely identify a performance system's receiving system; there are always some unrecognized clients, customers, users, or beneficiaries.

The total performance system will guide the design of the proposed internship system. The following chapter describes the design's logic and the methods, processes and tools for developing and implementing a progressive consultative internship system.

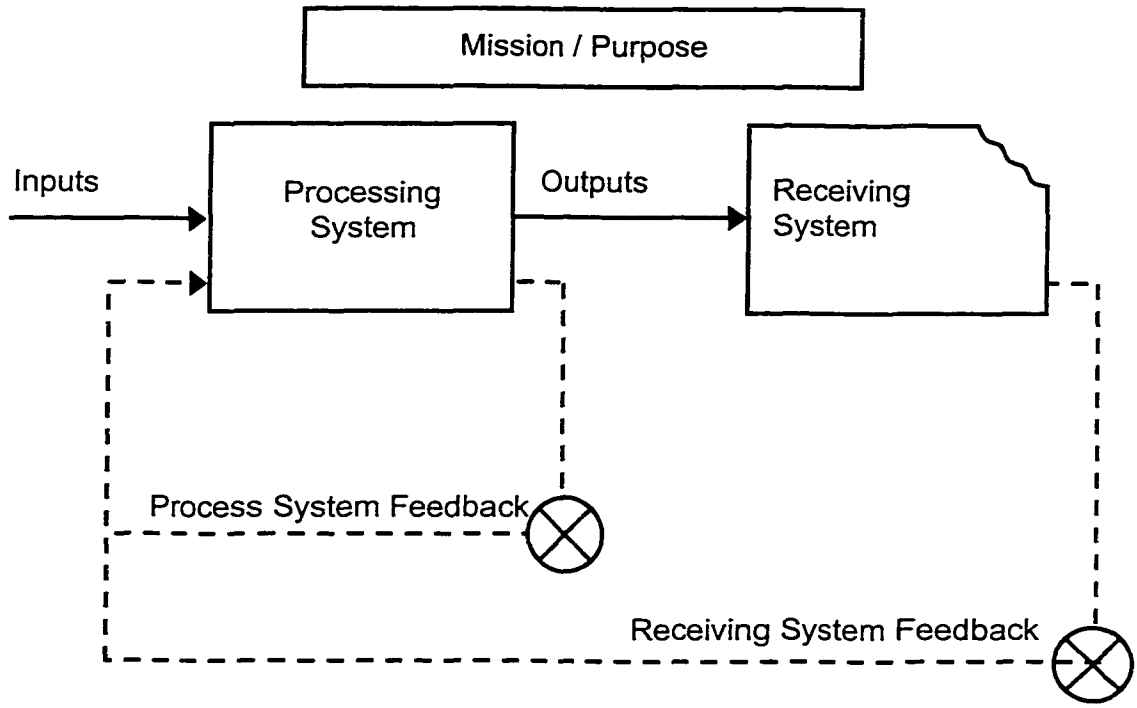

Figure 2. The Total Performance System (based on Brethower 1972, 1982, 1995).

Chapter Summary

This chapter used the behavior engineering model to describe elements of successful internships and successful consulting. The design of the proposed internship system was oriented along these elements. A behavioral systems approach using the total performance system provided the conceptual framework for specifying performance management contingencies that support intern learning and intern consulting.

Table 8

Elements of the Total Performance System

System element	Description
Mission	The major purpose or reason for being of a performance system.
Input	Information, technology, people, money, or material that initiates or is a resource for a work process.
Processing system	A system that processes inputs, generating at least one output valued by an external receiver.
Processing system feedback	Information about the performance of individuals, work groups, or processes that is used to guide performance.
Output	Information, payments, material, or added value that is produced by a task or process.
Receiving system	A set of systems that are closely linked to a processing system and receive its outputs.
Receiving system feedback	Information from customers and other external sources, used to guide performance.

CHAPTER III

DESIGN OF THE PROGRESSIVE CONSULTATIVE INTERNSHIP SYSTEM

This chapter describes the design of the progressive consultative internship system (PCIS). It begins with a description of the internship system's intended users; it then specifies the system's program theory (design logic) and its elements, namely its models, purpose, assumptions, goals, benefits, and the methods for achieving the goals and benefits. Following the description of the program theory, the chapter details the various processes and tools that will be needed to plan, implement, and maintain the proposed internship system.

The Users

Users of the progressive consultative internship system will be interns, sponsors, and faculty advisors. They will work together to connect intern learning and organizational performance improvement. Their roles will differ from traditional internship roles because the PCIS will cast interns as both learners and experts, sponsors as both mentors and clients, and faculty advisors as both coaches and administrators. The consultative internship system will dispense with the traditional role of a supervisor who is in daily contact with the intern; instead, it will view interns as autonomous consultants and performance experts. The following section

refers to interns in the plural form and to sponsor and faculty advisor in the singular form because a single progressive consultative internship system will be used by many interns yet may have only one sponsor and one faculty advisor.

The Interns

Interns in the PCIS will be both learners and experts. They will have to balance their internship goal of learning with their role as consulting expert.

Interns as Learners

As learners, interns will apply their (mostly theoretical) knowledge of performance technology, principles, and tools to a real-world performance system with real-world performance problems, namely county government. Interns will learn how local government operates, how to interact with government officials and staff, and how to effectively apply human performance technology (HPT) within a government system.

Interns as Experts

As experts, interns will conduct projects that are directly or indirectly linked to organizational performance. For example, projects directly linked to organizational performance improvement may include process improvements or performance-based instruction. Projects indirectly linked to performance

improvement may include strategic planning, developing organizational charts, or conducting surveys.

Other consulting activities may include facilitating meetings, report writing, and orally presenting information to management and staff. Performance improvement and performance measurement may be new to county government, and staff may be concerned about the implications of organizational change, such as unfamiliar job responsibilities. To support staff during the time of change, interns will champion the performance improvement effort within the organization through written and personal communication in non-technical language, and, foremost, through projects that support county employees in their daily work.

Ideally, interns will provide county staff with tools so that they will be able to maintain intern-supported performance improvement projects and, possibly, conduct such projects on their own. This transfer of technology may include using HPT tools in county documents and the application of HPT tools by county staff as a result of interns' consultations. Interns will achieve the transfer of technology through interactions on an individual basis, through presentations, exercises, or collaboration on actual projects. They will also model the use of performance improvement tools as they conduct various consulting projects.

The Sponsor

Several authors suggest that members of senior management should function as the intern's primary supervisor (e.g., Ames, 1992; Berger, 1992; Murphy, 1973a;

Pierson, 1992). Support by top executives is also considered essential for successful consulting (e.g., Kaplan & Norton, 1996). Thus, an appropriate sponsor for the PCIS at the county will be a high-level executive such as the county administrator or a department head. The county administrator will be in the position to provide interns with projects that may have general organization-wide impact. With the county's executive as sponsor, interns will be able to have access to top level decision-makers and decision-making processes. A department head, on the other hand, will be more likely to have consulting opportunities that relate directly to performance issues since department heads are often more immediately involved in providing services to citizens than county administrators.

In traditional government internships interns are supervised by and learn from a "practitioner supervisor" (e.g., Task Force, 1992). This is also the case in many clinical, medical, engineering, and other professional internships. In most cases, the PCIS sponsor will not be able to provide this degree of supervision and mentoring because he or she will not have the necessary expertise in human performance technology. It is the author's opinion that both a county administrator or a department head will make excellent sponsors as long as they are prepared to support change in their respective organizations. A sponsor will have two roles, namely that of interns' mentor and that of interns' major client.

Sponsor as Mentor

As experienced public administrator, the sponsor will mentor interns on county government theory and practice and introduce them to the formal and informal organization. Sponsors may teach interns through personal discussions, by providing literature, and by having interns attend top-level meetings within and outside the county organization.

Sponsor as Client

As interns' major client, the sponsor will assign projects but will not have the expertise to supervise interns with respect to selecting appropriate interventions. However, the sponsor-as-client will be in the position to make interns aware of limitations and restrictions of applying HPT within the county organization. As a client, the sponsor will allocate resources, such as funds and staff support, and request interns to conduct specific projects.

The Faculty Advisor

Because the sponsor will (most likely) not be a subject matter expert in the area of human performance technology, interns in the consultative internship system will not be assigned to the sponsor as a "master" who takes on an "apprentice." Instead, the faculty advisor will take on the role of subject matter coach and internship administrator and, thus, provide a professional safety net.

Faculty Advisor as Coach

As coach, the faculty advisor will provide professional supervision for interns as they apply HPT within the county organization. The degree of coaching will depend on each intern's expertise, the complexity of the projects, and the difficulties or conflicts arising during the internship. The faculty advisor will also monitor whether interns engage in learning activities such as reading relevant literature on HPT applications in county government. This will be necessary because interns may take on a large number of projects and thus will not have the time to read performance-related HPT and government literature.

Faculty Advisor as Administrator

The faculty advisor as administrator will act as the liaison between interns and sponsor and intervene when problems or difficulties occur that interns cannot handle alone. The internship system will attempt to resemble a real-world consulting environment, including the possibility for interns to make, and correct, mistakes. The faculty advisor will take great care not to interfere with the intern's consulting unless potential problems such as the possible waste of financial resources may result from interns' actions. With respect to the long-term maintenance of the system, the faculty advisor will be responsible for supplying new interns.

Summary. The PCIS will cast its users in both traditional and nontraditional internship roles. Interns will be both learners and expert consultants. The sponsor

will be interns' government-expert mentor and their major client; the faculty advisor will be intern's subject matter coach and the internship system's administrator.

Program Theory of the Internship System Design

This section specifies the program theory of the internship system design. It delineates the progressive consultative internship system's purpose, defines its short-term goals and long-term benefits for all three user groups, and outlines methods needed to achieve these goals and benefits.

Program theory (or design logic) is defined as "a set of assumptions about the manner in which the program relates to the social benefits it is expected to produce and the strategy and tactics the program has adopted to achieve its goals and objectives" (Rossi, Freeman, & Lipsey, 1999, p. 78). A program's theory may be based on research findings and/or the program designer's perceptions (Worthen, Sanders, & Fitzpatrick, 1997). In the present case, the program theory is based on internship, consulting, and HPT literatures, as well as, the author's own internship.

Program theory is a causal concept describing the cause-and-effect sequence in which programs produce certain benefits. Rossi et al. (1999) observe that

> Because programs rarely exercise complete, direct control over the social conditions they are expected to improve, they must generally work indirectly by attempting to alter some critical but manageable aspect of the situation, which, in turn, is expected to lead to more far-reaching improvement. (p. 102)

The proposed internship system will not, of course, exercise direct control over the performance improvement efforts of a county government or a university's teaching practices. Instead, the PCIS will provide tools for interns, sponsors, and faculty

advisors to establish and manage a quality learning environment in which students can both learn and successfully consult. Figure 3 provides an overview of the design's program theory that shows the conceptual logic of the PCIS as it flows from three general models to specific processes and tools for supporting intern learning and consulting.

Models and System

The design of the internship system is based on three models, namely successful internships, successful consulting, and human performance technology that will provide an underlying structure for supporting interns' independent consulting in county organizations. The internship system will incorporate the first two models into its support processes and tools. Individual interns will add their specific expertise in human performance technology. These models provide the theoretical foundation for achieving the internship system's purpose.

Purpose

The purpose of the progressive consultative internship system will be to combine intern learning with organizational performance improvement. It will do so by connecting individual HPT internships so they will become elements of a continual consulting process within the interning county organization. This progression can work because each intern's accomplishments will set the stage for the following intern's consulting, thereby ensuring both continuation and progression.

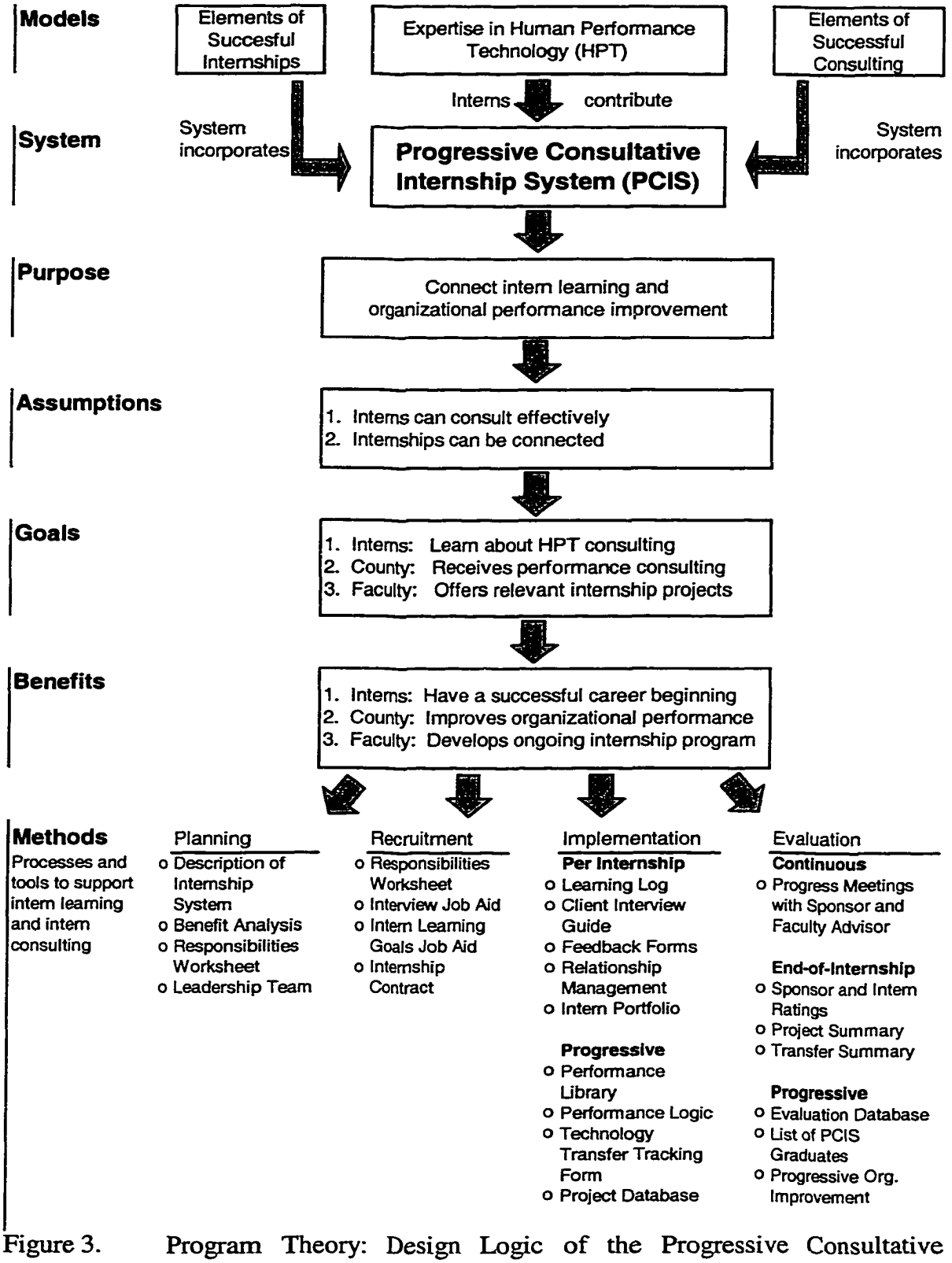

Figure 3. Program Theory: Design Logic of the Progressive Consultative Internship System.

A progressive connection of internships will support the PCIS purpose in that it will enable interns and their sponsor to build specific interventions into a system of county-wide performance improvement that spans across departments. This progressive nature of the PCIS will be important for showing county officials that the internship system will be able to connect to the organization's performance in a meaningful way. Without the prospect of a progressive nature, county officials may not be willing to commit the resources necessary to support a long-term internship program.

A secondary purpose of the PCIS will be to support the sponsoring organization and the faculty advisor's university in developing a mutually beneficial relationship. Spending county and university resources on establishing and maintaining the internship system will be worthwhile only if the system can provide short-term and long-term benefits to both stakeholders. Unless the county will realize lasting organizational benefits and the PCIS will provide meaningful and challenging internships to the university's graduate students, the internship system will not be able to achieve its long-term benefits.

Assumptions

The design of the progressive consultative internship system rests on two assumptions. The first assumption is that interns can consult effectively. The second assumption is that individual internships can be connected so they will provide a progression in learning opportunities and organizational performance improvement.

Assumption 1: Interns Can Consult Effectively

The first assumption is that interns, as experts, will be able to provide effective performance consultation to the interning county government. Effective means that interns will develop and implement performance improvement and performance management systems, and that these systems will eventually generate demonstrable organizational performance improvement. Interns will achieve these goals as they solve specific performance problems or develop organizational strategies support for long-term performance improvement. Effective also means that interns will transfer human performance technology into the county organization to enable county staff to conduct and maintain performance improvement projects.

Assumption 2: Internships Can be Connected

The second assumption is that internships can be connected in two ways. With respect to learning, the PCIS will provide subsequent interns with progressive learning resources; with respect to consulting, it will provide the county with (almost) seamless cost-effective internal performance consulting. This dual progression is a key element of the design because internships and organizational performance improvement will occur in different timeframes. The former typically last one year while the latter extends beyond a single internship as projects may take several years to complete. For example, Dallas County reported that it took seven years to install a county-wide performance measurement system (Scheps, 2000). Organizational performance improvement is, in fact, never truly completed (e.g., Rummler &

Brache, 1995). It would be impractical, therefore, to view each PCIS internship as a self-contained student project independent from preceding and subsequent internships. The progressive consultative internship system will work within these dual timeframes and provide tools for making progressive connections.

The progressive nature will also optimize intern learning. As interns learn about the interning county, about county, state, and federal government in general, and about performance improvement in the public sector, they will collect relevant learning resources, such as books, journal articles, or copies of Internet-based information. Subsequent interns will be able to access this progressive knowledge base and accelerate their own learning. Figure 4 shows, conceptually, how this knowledge progression will set the PCIS apart from traditional internships in which learning resources remain fairly stable across time.

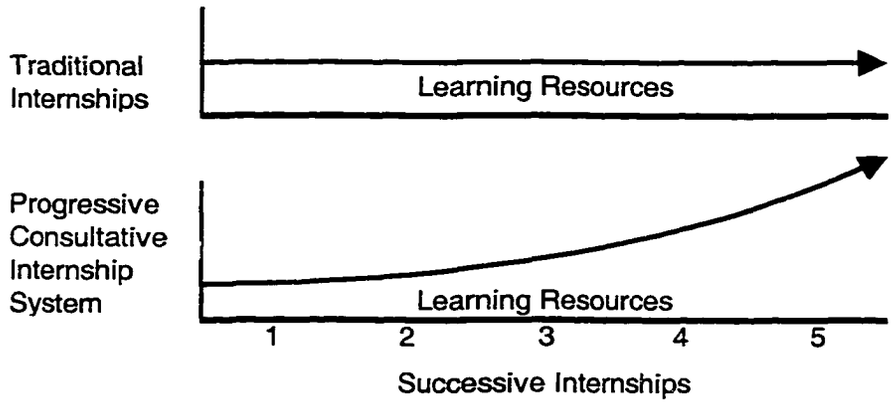

Figure 4. Program Theory: Conceptual Comparison of Learning Resources Between Traditional Internship Programs and the PCIS.

Goals

The goals of the progressive consultative internship system represent short-term benefits to be realized during each internship. These goals are: (1) interns learn about consulting, (2) interning county receives performance consulting, and (3) faculty sponsor offers relevant internship projects.

Goal 1: Interns Learn about HPT Consulting

The goal for individual interns will be to learn about HPT consulting. Most learning will occur as interns interact with clients and conduct performance improvement projects and, thus, improve their consulting and interpersonal skills. These skills are considered important elements of successful professional consulting (e.g., Block, 2000; Gray, 1985; Weiss, 1998). Additional theoretical learning will occur as interns read articles and Internet-based information related to performance improvement in the public sector. Support material may be provided by the sponsor or by county staff interns will be working with on specific performance improvement projects.

Goal 2: County Receives Performance Consulting

The goal for the sponsoring organization during each internship will be to receive performance consulting that contributes to the county's efforts in improving its organizational performance. During each individual internship, interns will conduct progressive performance improvement as they use previous interns'

accomplishments. For example, one intern may work with staff to establish a performance measurement system for a specific project and begin to collect baseline data. The following intern will use these data to troubleshoot performance and to develop and implement an intervention. Data for maintaining the intervention will be collected with the first intern's performance measurement system. This example does not imply that interns cannot achieve actual performance improvements during their individual internship. The point is that even though this hypothetical performance improvement was not completed by the first intern, it was a step toward performance improvement. Thus, interns will provide relevant performance consulting during their internship that will contribute to performance improvement in both the short-term and the long-term.

Goal 3: Faculty Sponsor Offers Relevant Internship Projects

The faculty sponsor's goal with each internship will be to offer relevant applied projects to his or her graduate students. University professors have the challenge to provide graduate students with projects they can use to fulfill practicum requirements or that are appropriate for theses or dissertations. The internship system will give faculty the opportunity to offer these types of projects to their graduate students.

Benefits

Benefits are defined as the long-term outcomes for each user. They differ from goals in that they extend beyond individual internships. The PCIS is designed to provide the following three benefits: (1) interns have a successful career beginning, (2) the sponsoring county improves its organizational performance, and (3) the faculty advisor develops an ongoing internship program.

Benefit 1: Interns Have a Successful Career Beginning

Many interns benefit from completing an internship by increasing the chance of landing a post-graduation job with a preferred organization and of receiving higher starting salaries than non-interns (e.g., Peterson's, 1997; Taylor, 1992). The long-term PCIS benefit for interns will be that their independent consulting experience within county government will make them attractive to potential employers. Therefore, they may land post-graduation jobs that will match their education and meet their intellectual and financial expectations.

Benefit 2: County Improves Organizational Performance

The sponsor's reason for implementing a progressive consultative internship system will be to recruit cost-effective expertise to provide organizational performance consulting. That does not mean that PCIS interns will be the only source for generating performance improvement; the organization may also utilize external consultants and county staff for its performance improvement efforts.

Interns may support the implementation of consultant-recommended or staff-developed performance improvement projects. In any case, the county will maintain a progressive consultative internship system only when it leads to measurable improvements (e.g., customer satisfaction, process improvements, reduced turnover).

Benefit 3: Faculty Advisor Develops an Ongoing Internship Program

Over time, the faculty advisor may develop the PCIS so that it will evolve into an important part of the department's educational offerings. An ongoing internship program for performance consulting in county government could be used to recruit outstanding students into the department.

As sponsor and faculty advisor cooperate to recruit interns and support their internships, they may identify opportunities for cooperation outside the area of HPT, such as public administration, criminal justice, or marketing. The faculty advisor would be in a position to establish initial connections to other university departments who can provide the necessary expertise. Possibly, other units of local government, such as a city, may learn about the PCIS and, if it will be successful at the county, may install the PCIS into their own organization. Thus, the internship system may over time generate additional venues for the university to collaborate with important members of the local community.

Methods

Achieving the short-term goals and long-term benefits requires methods that transform the system's model, purpose, and assumptions into a useful and feasible internship system. The design of the progressive consultative internship system as a total performance system incorporates the following four methods: (1) planning the internship system, (2) selecting and recruiting interns, (3) implementing learning and consulting support, and (4) evaluating intern learning and organizational performance improvement (Figure 5). Detailed descriptions of each method's processes and tools will follow this section.

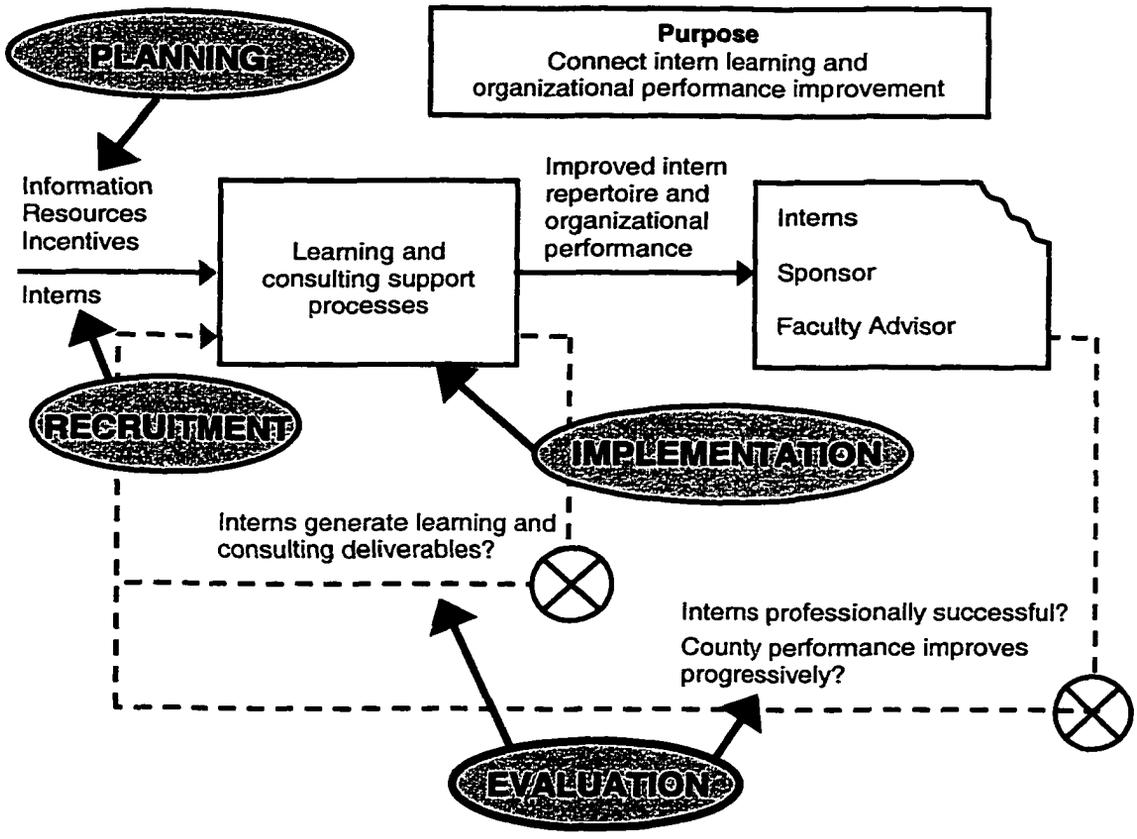

Figure 5. Program Theory: Four Methods for Achieving Short-term Goals and Long-term Benefits.

Method 1: Planning

Consider the following scenario. Several government officials, HPT faculty, and graduate students have received a document that outlines the purpose of the progressive consultative internship system (possibly sent by the developer of said system). What information will these officials and faculty need to decide if they want to set up and maintain such a system? What information will graduate students need to decide if they want to participate in a consultative internship?

The purpose of the planning process is to provide users with this information so they will understand the aforementioned goals and benefits of the PCIS. The PCIS planning process will focus on sponsor and faculty advisor because the burden of establishing and maintaining the system will fall on them. The PCIS will support their decision-making by providing tools that clearly describe the necessary resources and responsibilities. At the end of (most) successful planning processes, sponsor and faculty will agree to implement the progressive consultative internship system.

Another type of successful outcome may occur when a government official, for whom the PCIS may not be the right solution, will decide not to implement it. For example, a county official with urgent large-scale performance problems may use a consulting firm because it will be able to send an entire team of consultants to the organization and to quickly develop recommendations for performance improvement. (However, PCIS interns would be well suited for supporting the county in implementing the consultants' recommendations.)

Method 2: Selection and Recruitment of Interns

The success of the internship system will not only be a function of planning the internship system; it will also require a supply of graduate students who take on the consulting role. Faculty typically know which of their graduate students may be qualified for, and would benefit from, such an internship. Therefore, selection and recruitment tools will be used to guide sponsor and interns through the selection process.

Method 3: Implementation of Learning and Consulting Support

The PCIS must be able to support learning and consulting during both individual internships and across successive internships. Its tools must allow interns to optimize learning and consulting, otherwise one or the other will suffer. For example, it will be tempting for interns to spend most of their time on performance improvement projects. While not a problem in the short-term, this form of subsystem maximization may defeat the purpose of the internship system because learning should not only consist of hands-on consulting but also of acquiring additional theoretical knowledge with respect to performance improvement in the public sector.

Method 4: Evaluation of Progress Toward Goals and Benefits

Intern learning is the central focus of all internships. Most internship programs evaluate the quality of intern learning by changes in interns' knowledge, skills, and abilities. In additions, interns have to document the successful completion

of behavioral requirements, such as number of client contact hours, total hours supervised, and training activities attended (e.g., Grand Valley State University, 1998; Sweitzer & King, 1999). Benefits to the organization are typically not part of internship evaluations, although some organizations assess those separately from intern learning (e.g., Greenberg et al., 1998; Schauble et al., 1989). In other words, traditional internships are considered successful as long as interns get something out of them even if organizations do not realize tangible benefits, other than having an inexpensive alternative to professional staff.

The hallmark of good performance consulting is its focus on evaluation (Van Tiem, Moseley, & Dessinger, 2000). In contrast to traditional internship evaluations, the PCIS will evaluate its success not only by intern learning but also by the outcomes of intern consulting. The PCIS design incorporates short- and long-term evaluation into all phases of the internship system (Figure 6). These evaluation processes will assess intern learning and organizational performance improvement.

Summary. The design of the progressive consultative internship system merges intern learning and intern consulting into a continuous and progressive process. It aims to benefit both interns and the interning county organization. It is based on the assumptions that HPT interns can consult effectively and that individual internships can be connected to form a succession of internships with progressive impact on learning opportunities and consulting outcomes. The design addresses short-term goals and long-term benefits for each of its three user groups and proposes four methods for achieving these goals and benefits. The remainder of this chapter

describes each method's processes and tools and specifies how the system will link intern learning and consulting to organizational performance improvement.

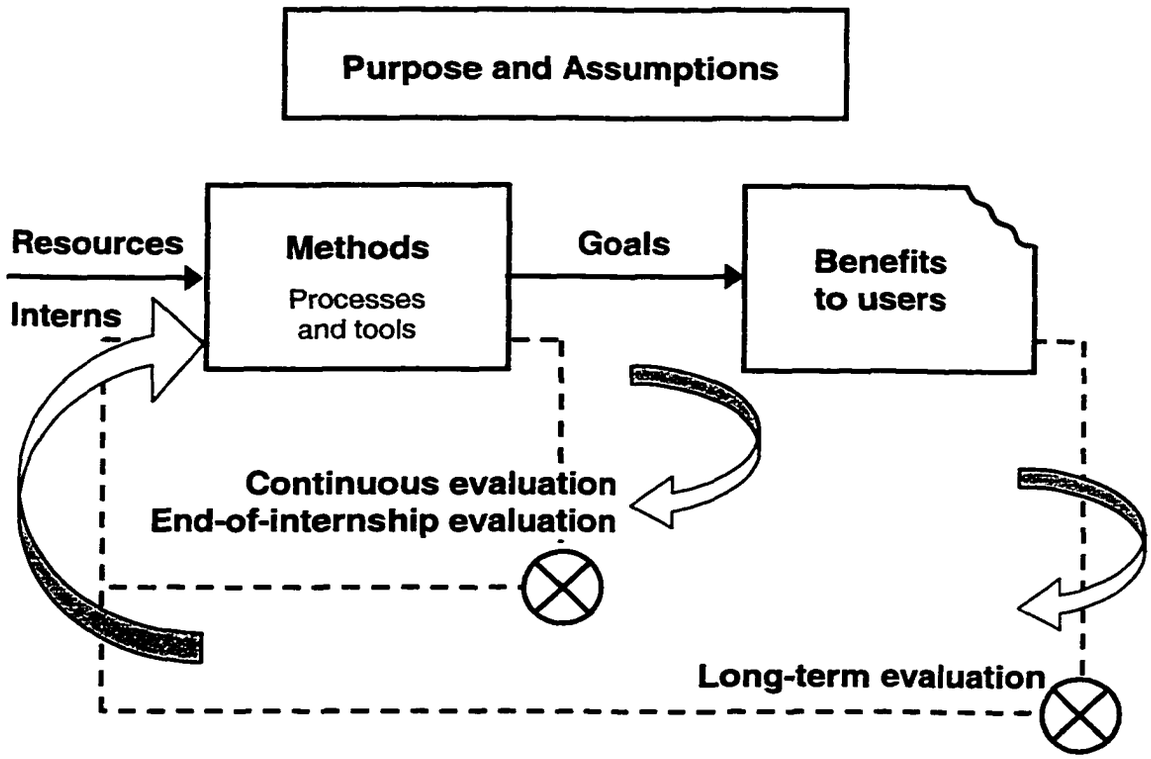

Figure 6. Program Theory: Evaluation in the Progressive Consultative Internship System.

Processes and Tools

The purpose of the internship system's processes and tools is to support the internship system's users in planning and implementing the progressive consultative internship system. Figure 7 shows the system's four main processes. This diagram will be completed as each of the following sections details specific processes and tools.

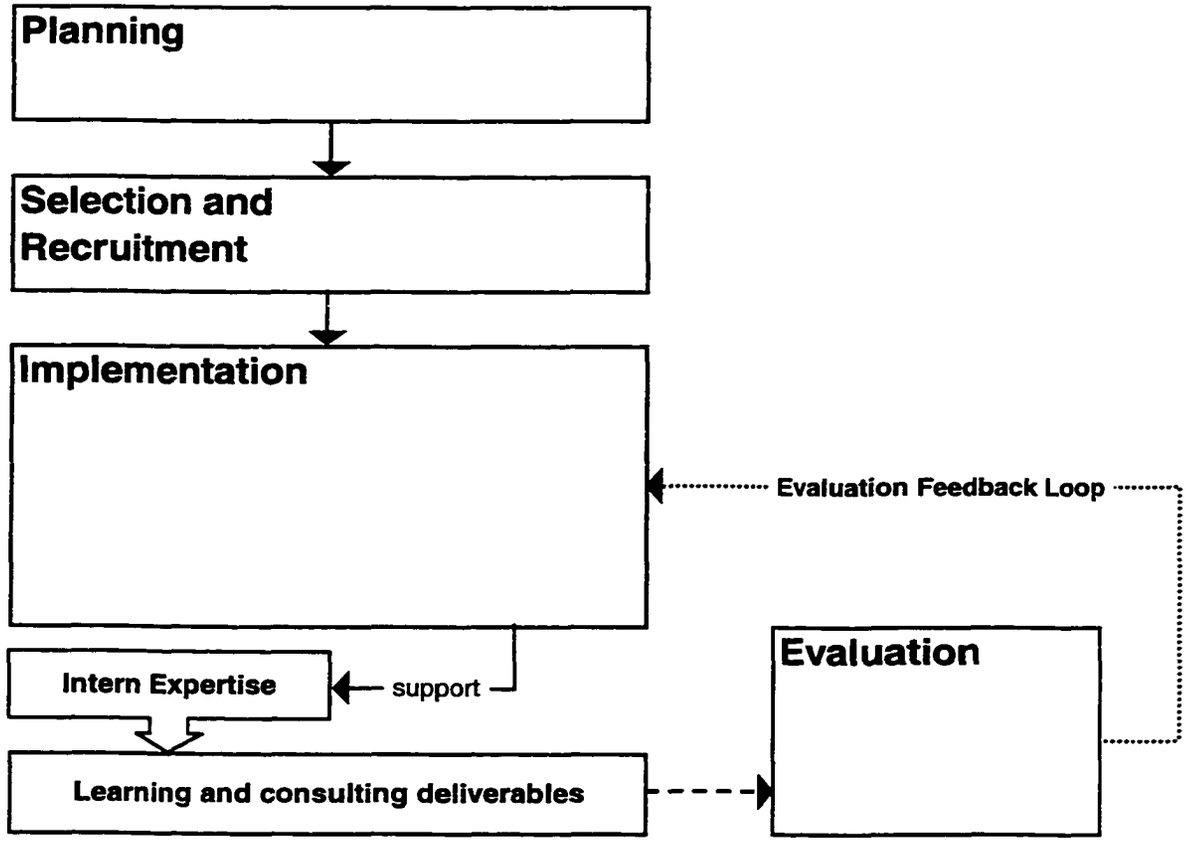

Figure 7. The Four Main Processes of the Progressive Consultative Internship System.

If the author's experience can serve as a guide, it can be expected that PCIS interns will be very busy conducting improvement projects. Therefore, the design will provide only those tools for supporting progressive intern learning and consulting that are not otherwise available. For example, it does not include tools for project planning and scheduling because it is expected that interns will use their own time management and project management tools.

Planning

The PCIS will include the following planning tools: (1) a description of the PCIS, (2) a benefit analysis, (3) responsibilities worksheets for sponsor and faculty advisor, and (4) the performance improvement leadership team (Figure 8). The faculty advisor may choose to involve the prospective first intern in the planning process; however, no specific tools are included for the intern during this phase.

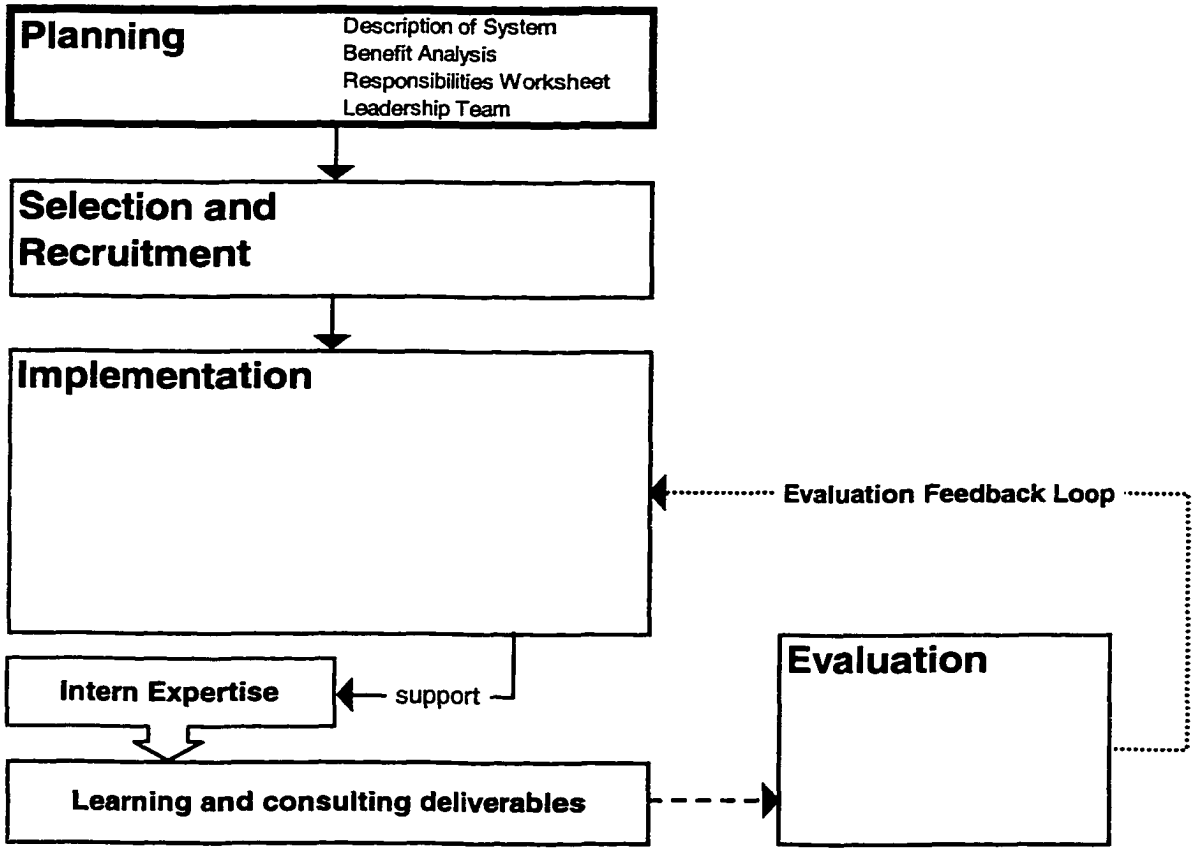

Figure 8. Tools for Planning the Progressive Consultative Internship System.

Planning Tool: Description of the PCIS

This description will introduce potential users to the progressive consultative internship system. Its purpose will be to encourage county officials to create the internship system in their organization, faculty to install and supervise it, and students to apply for an internship. It will explain the system and its rationale and outline short- and long-term benefits for the county, students, and the university. It will provide a background on the need for county government to change in response to citizen demands, diminishing resources, state mandates, and a constantly shifting socio-economic environment, thus positioning the PCIS as a possible means of cost-effective performance improvement. It will describe how the system will connect individual one-year internships of HPT graduate students in order to achieve the short-term goals and long-term performance improvement goals described earlier. The description tool will address the role of interns as both learners and experts, the role of the sponsor as both government mentor and client, and the role of the advisor as coach and administrator.

Planning Tool: Benefit Analysis Worksheet

Once a potential sponsor shows interest in the internship system, the faculty advisor and the county official will work together to determine if the PCIS will be able to address specific performance needs in the county organization. This tool will guide a discussion regarding performance improvement issues in county government (e.g., respond to citizen complaints, resolve performance problems, improve

inefficient processes) and help explore the county's options for addressing those performance gaps. These options may include working with outside consultants, conducting performance improvement projects with county staff, hiring interns to serve as internal consultants, or a combination of all three. The benefit analysis tool will then prompt the sponsor to identify specific projects that could be taken on by HPT interns.

Planning Tool: Sponsor and Faculty Advisor Responsibilities Worksheet

The purpose of this planning worksheet will be to provide sponsor and faculty advisor with an overview of their responsibilities within the progressive consultative internship system. It will also address the resources needed for implementing and maintaining the PCIS. Intern responsibilities will be addressed under intern selection and recruitment, below.

Sponsor Responsibilities. This worksheet will describe the sponsor's role of mentor and client. It will suggest that the sponsor spend two to three hours per month in biweekly progress meetings with interns and provide interns with access to meetings with county officials and external consultants. It will outline resources needed for supporting interns, such as clerical support for copying, mailing, or typing, office space, supplies, a personal computer, and access to the county's intranet and e-mail system. It will suggest to place interns on the sponsor's mailing list to keep them abreast of high level county decision making processes. It will suggest further that interns receive a title such as "Coordinator" to reflect the professional status of

the internship position and that personalized business cards and stationary will be made available for networking within and outside the county organization.

The worksheet will also address intern salary. It should be competitive with other graduate student employment opportunities within or outside the university setting. For example, a large Midwestern university pays graduate assistants approximately $20/hour, including tuition, enrollment fees, and parking permits. Suggestions will also include that interns receive some form of work benefits; for example, paid time off in the form of paid holidays or personal days and pay raises for good performance (e.g., after 6 months). Thus, the sponsor will be able to estimate the internship's impact on the organization's budget.

Faculty Advisor Responsibilities. While the sponsor will provide organizational resources, the faculty advisor will provide human resources for the system, namely, graduate students. It will be the faculty advisor's responsibility to maintain a flow of interns into the system. The faculty advisor will work closely with current students and will be familiar with incoming students' professional background and, therefore, be able to select those students who may function as internal consultants with minimal faculty guidance. The worksheets will also describe the faculty advisor's role as coach and system administrator. It will suggest that the faculty advisor meet regularly (e.g., biweekly) with interns.

Performance Improvement Leadership Team

The PCIS design recommends that the sponsor assemble a performance improvement leadership team with about seven to ten members. The purpose of the leadership team will be to support the sponsor's commitment to performance improvement within his or her organization (e.g., county or department), to support interns, and to facilitate the transfer of technology from interns to county staff. If a county administrator will be the sponsor, then the leadership team should include representatives from various county departments. If a department head will be the sponsor, then the team should include staff from different operations within the department. In either case, the team should include managerial, professional, and technical staff.

Intern responsibilities with respect to the team will include coordinating and facilitating meetings, identifying critical issues, providing technical expertise, and guiding the team's learning about performance improvement. During the early months after implementing the leadership team, the first intern could educate team members on performance improvement principles and tools. Over time, the team may take a more active part in organizational/departmental performance improvement and work with the intern on developing and implementing improvement projects. As leadership team members learn about performance improvement they will be able to champion county-wide performance improvement throughout the organization.

Team members will also be able to provide interns with valuable insight into both the formal and informal organization; they may also identify obstacles and

barriers to specific performance improvement projects. For example, the author considered using a lottery to increase the return rate of an employee survey. Members of Kalamazoo County's Continuous Quality Improvement Steering Team pointed out that employees not receiving the monetary reward may become disgruntled and oppose later performance improvement initiatives. As a consequence, the survey was conducted without using incentives.

Intern Selection and Recruitment

Once sponsor and faculty advisor agree to set up the progressive consultative internship system, they will work together on selecting and recruiting their first intern. Unlike the planning phase, intern selection and recruitment will occur on a regular basis, most likely annually. Figure 9 shows the tools for intern selection and recruitment: (1) intern responsibilities worksheet, (2) interview job aid, (3) intern learning goals job aid, and (4) the internship contract.

Intern Responsibilities Worksheet

The purpose of the intern responsibilities worksheet will be the same as for sponsor and faculty advisor responsibilities worksheets used during the planning phase, namely, to provide interns with an overview of their responsibilities within the progressive consultative internship system. The intern responsibility worksheet will suggest that graduate students have relevant professional experience, will be able to work with little supervision, and have demonstrated adequate writing and

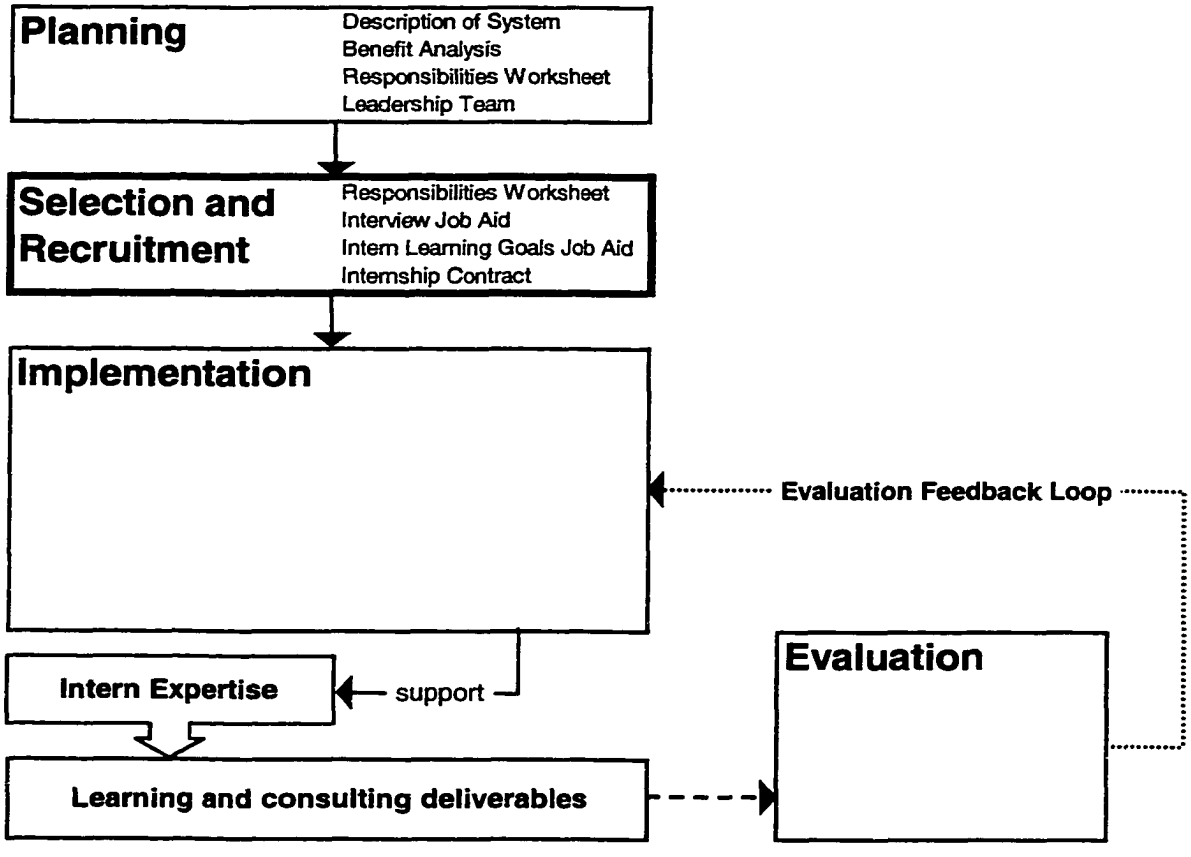

Figure 9. Tools for Intern Selection and Recruitment.

presentation skills. As PCIS interns, their responsibilities will include preparing and facilitating meetings, making educational and project-related presentations, conducting performance improvement projects, and collaborating with outside consultants. Interns will also be responsible for establishing and maintaining good working relationships with the county's elected and appointed officials, and with all other staff.

As learners, interns should spend one or two hours per week on reading materials provided by sponsor or faculty advisor. Setting aside a specified amount of paid time may keep interns from placing learning on the "back burner." Interns will

be accountable for documenting their learning activities by discussing learning deliverables (e.g., notes written in margin of article, questions generated by the literature, etc.) with sponsor and faculty advisor. Interns will also conduct evaluations toward the end of their internships. Outgoing interns will familiarize incoming interns with the PCIS tools and with the status of current performance improvement projects. They will also introduce new interns to county staff.

Interview Job Aid

The purpose of the interview job aid will be to prepare sponsor and intern for the PCIS job interview. The interview situation will be similar to that of an initial consulting interview in which the client (i.e., sponsor) describes the problem to the consultant (i.e., intern). During the interview, the sponsor will describe the internship system from his or her perspective and outline past and current PCIS projects. The job aid will prompt sponsors to address current and potential PCIS projects. It also will suggest that the sponsor state his or her expectations with respect to intern performance and how the PCIS fits within the county organization. Sponsor and interns should further discuss intern pay, possible benefits such as paid time off for holidays or personal days, and pay raises for outstanding performance.

The interview job aid will recommend interns to show samples of their consulting work and/or relevant academic course work. This show-and-tell will provide interns with the opportunity for a real world interview during which they will be able to demonstrate to their prospective sponsor-client why they are qualified to

conduct HPT consulting in county government. Qualifications will vary from intern to intern. For example, some interns may be strong in data collection and performance measurement but may not be experienced with working in teams while other interns may have well-developed facilitation skills but lack knowledge or experience in strategic planning. Thus, because this system is designed for students, sponsors should expect to hire graduate students who are experts in some areas and novices in others. Ideally, the internship system will help interns to acquire expertise in their inexperienced skill areas.

The interview will also be an ideal opportunity for sponsor and intern to discuss interns' thesis and dissertation projects. The job aid will prompt interns to address this issue at this time to avoid later conflicts with intern responsibilities. Interns will explain the planned projects to their prospective sponsor and suggest how the county might benefit from, and contribute to, those projects.

Intern Learning Goals Job Aid

The purpose of this job aid will be to support interns in developing learning goals for their internship within the PCIS. Learning goals will guide interns, as well as sponsor and faculty advisor, through each student's internship. Interns will review these goals with both the sponsor and the faculty advisor. The learning goals will be used later for the intern's evaluation of the internship.

Internship Contract

Both internship and consulting literatures suggest the use of contracts. Internship contracts spell out clear expectations between intern and internship site or supervisor (e.g., Berger, 1992; Heimovics, 1973; Peterson's, 1997; Sweitzer & King, 1999; Tooley, 1997); consulting contracts specify project scope, timetable, and deliverables (e.g., Gray, 1985; Holtz, 1986, 1989; Mitchell, 1998; Weiss, 1998). The PCIS internship contract will commit interns to meeting the expectations set forth in the responsibilities worksheet and the learning goals. The sponsor will commit to providing the necessary resources and incentives identified during the planning phase and the interview. Because sponsor and interns will not be able to anticipate all intern projects, the contract will focus on general aspects of the internship, such as a commitment to regular progress meetings. Depending on the sponsoring county's human resources policies, sponsor and intern may have to enter into an additional part-time or temporary employment contract.

Implementation: Supporting Individual Internships

With the signing of the internship contract, sponsor and intern will begin their professional relationship. At this point, the internship system will enter its implementation and evaluation phases. Figure 10 shows the processes and support tools for supporting implementation.

Implementation tools can be divided into two categories: (1) tools that will support individual internships and (2) tools that will connect internships together into

a progressive learning and consulting system. Tools that will support individual internships will be non-progressive self-contained learning and feedback mechanisms. Tools that will connect individual internships will create the progressive piece of the internship system.

Tools supporting individual internships will be described first. They consist of (1) the learning log, (2) the client interview guide, (3) the client feedback forms, (4) the relationship management tool, and (5) the intern portfolio.

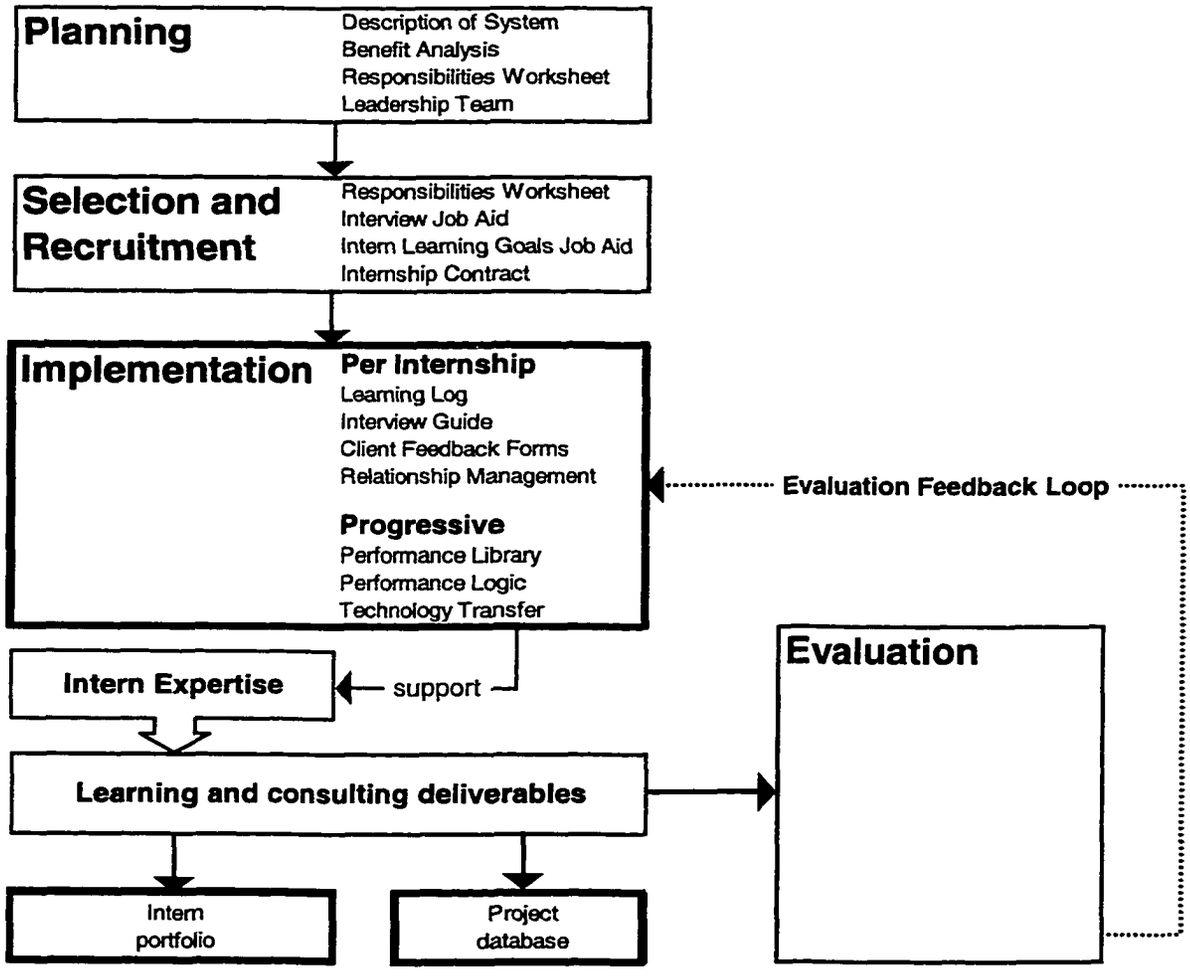

Figure 10. Processes and Support Tools for Implementation.

Learning Log

The internship literature suggests that interns keep detailed records of specific events for discussion with their supervisor and to keep internship diaries (e.g., Schweitzer & King, 1999). Time, however, will be consulting interns' most valuable resource and should not be spent writing detailed accounts of client interaction when short notes suffice. Were interns to spend too much time on documenting their internship experiences, then they may altogether avoid keeping any records. The PCIS learning log, therefore, will provide a means for interns to record their observations, questions, or concerns in a concise way so they can later use those notes for discussion with their sponsor or faculty advisor.

The log will use two categories of entries based on Brethower's "Sensationals" and "How-Abouts" (D. M. Brethower, class material, January 6, 1998). Interns will note a sensational when they encounter a consulting event that supports their current understanding of HPT and county government. For example, interns may note the experience of applying a specific HPT tool for the first time, or in a new setting. The sensational may read "The behavior engineering model exercise generated the same results in county government as reported for the private sector." How-abouts will consist of questions. For example, interns may read about performance improvement in the public sector and ask "How did County X implement a performance improvement plan in only two years?" or "What is the bottom line for county government?"

The tangible learning product will consist of entries in the learning log. The log may be a computer file or a loose-leaf binder. Interns will discuss sensationals and how-abouts during progress meetings (described below). If interns and sponsor (or faculty advisor) agree that sensationals or how-abouts will be relevant for subsequent internships, interns will add them to the performance improvement library (described below).

Client Interview Guide

During their internships, interns will interact with a number of people in and outside of county government. The client interview guide (based on Brethower, 1987; Appendix B) will provide interns with questions that will enable them to view staff and their departments as interrelated performance systems. Questions will address a client's roles, accomplishments, goals, and customers and how these customers benefit from the client's accomplishments. The interview guide will be an important learning tool because it will be immediately relevant to the current intern's learning and consulting. It will introduce interns to clients and clients to interns. This system approach will allow interns to get a fast understanding of the formal, and often also the informal, organization. The learning product will consist of completed interview guides. Interns may place copies of completed interview guides in the performance improvement library (described below) for use by future interns after removing any confidential information.

Client Feedback Forms

As performance consultants, interns will conduct performance improvement projects and facilitate meetings with county staff. These projects and meetings will be essential ingredients of the PCIS learning experience as interns interact with many different people, some of whom have never been in one room together even though they work for the same department. Consulting is a people business (e.g., Block, 2000; Finnegan, 2000; Weiss, 1998); therefore, interns will need feedback on the quality of their interaction with county staff. This will be particularly important during the early part of their internship as they develop relationships and position themselves as internal consultants.

The PCIS will include two client feedback forms, one for the evaluation of meetings and one for the evaluation of projects (Appendix C). Meeting feedback forms will be used for intern consultations that consist of a single meeting and for meetings conducted at the beginning of a project. Project feedback forms will be used at the end of a project or at the completion of significant project milestones, such as the installation of a performance measurement system. The product will consist of completed feedback forms. These form will provide interns with staff perceptions about what worked well (and should be continued) and about what can be improved.

By using these evaluation forms, interns will model to county staff that feedback is an important aspect of performance improvement; interns will demonstrate this by being willing to be evaluated themselves. Modeling the use of feedback will not only include asking for it, but also demonstrating how it was used.

For example, if clients indicate that the initial meeting had shortcomings (e.g., intern did not stick to agenda, meeting did not start or end on time), interns should report back later how they used this information to make specific changes.

Relationship Management Tool

"Consulting is a relationship business" (Weiss, 1998, p. 59, emphasis in original). Relationship building is important for both external consultants and internal consultants. Finnegan (2000) had the following advice for internal consultants:

> Internal consultants need to build a list of those who excel at analysis, implementation, or both. Most organizations have only a handful of people who are excellent at both. The point: Look for any chance to work with anyone on your list. (p. 21)

PCIS interns will be, by definition, internal consultants. The purpose of the relationship management tool will be to provide them with a means to build and manage relationships with key stakeholders and clients. The tool will support relationship building with officials and staff who are experienced in or lean favorably toward performance management, as well as, those members of the county organization who are skeptical toward a county-wide commitment to performance improvement.

The relationship management tool will prompt busy interns to stay in touch with key players on a regular, perhaps monthly, basis. It will list the names of employees interns (plan to) interact with frequently and what these employees like to talk about, such as work, performance improvement, family, or hobbies. Interns will

enter the dates of interactions with each person. For interactions to count as data points they should occur during one-to-one conversations, thus ruling out interactions that occur in groups (e.g., meetings).

Interns will be able to build and maintain relationships by establishing themselves as reinforcers for county staff's social behaviors such as talking, complaining, telling jokes, etc. But how will interns find out what employees like to talk about? Not all interns will have excellent social repertoires and some may find it difficult to conduct informal conversations. However, developing interpersonal communication skills will be critical for interns' future careers as consultants (both internal and external). The relationship management tool will include tips on establishing and maintaining relationships, such as Dale Carnegie's (1938) classic advice on making friends and influencing people:

(a) Become genuinely interested in other people.

(b) Smile.

(c) Remember that someone's name is to him or her the sweetest and most important sound in the English language.

(d) Be a good listener. Encourage others to talk about themselves.

(e) Talk in terms of the other person's interest.

(f) Make the other person feel important—and do it sincerely.

As interns discover what staff like to talk about, they will record this information as key words in a matrix. They will use it to maintain the relationships with their clients and other key stakeholders.

The relationship management tool will enable interns to follow staff's development with respect to HPT. For example, interns may track the acceptance and transfer of human performance technology as they help staff understand performance improvement, talk about it, champion it, and eventually implement it. Interns may be able to support this development through formal training sessions or by sending articles or web page addresses to the person. Follow-up telephone calls will enable interns to answer questions and provide additional information.

Intern Portfolio

The intern portfolio will have two purposes. First, it will be used as a document for the evaluation occurring toward the end of each internship. Second, interns will be able to use it for future job interviews to demonstrate the array of consulting projects they conducted in county government.

The intern responsibilities worksheet will prompt interns early in their internships to begin collecting deliverables when it can be done without a high response cost rather than toward the end when too much time may be spent on finding and collecting relevant documents. Interns will collect samples of their work throughout their internships to document learning and consulting and to "demonstrate mastery" (Brethower & Smalley, 1998). The portfolio may include learning and consulting deliverables, performance improvement data, newsletter articles, presentations, completed client feedback forms, reports written by the intern, and other non-confidential products generated during the internship.

Implementation: Connecting Individual Internships

The progressive consultative internship system will also provide tools to connect individual internships to form the progressive learning and consulting system described earlier. To achieve this purpose, the PCIS will include the following four tools: (1) the performance improvement library, (2) the county performance logic, (3) the technology transfer tracking form, and (4) the project database (Figure 10).

Performance Improvement Library

The purpose of the performance improvement library (PI library) will be to provide information for intern learning and intern consulting. One of the first pieces for this library will be contributed by the sponsor, namely orientation information consisting of the county's (and department's in case of departmental sponsorship) mission, vision, and goals, organization chart, descriptions of departments (programs) and their functions, a map showing the county and county government facilities, contact information for key officials, and office procedures (e.g., reporting hours, charging copies, etc.). This orientation material, as well as the material interns add later, will be in loose leaf format to facilitate updates.

Interns will add items to the PI library as they learn and consult. For example, interns may add copies of articles or book references related to county government performance improvement, performance management and measurement, benchmarking, and government in general. They may also add items from their learning log as described earlier. As this knowledge base grows, new interns will

begin their internship with a "running start" as they draw from past interns' experiences.

Interns will encourage county staff to utilize the performance improvement library for their learning about performance improvement in the public sector. Ideally, it will become a tool that supports the county as a learning organization (e.g., Senge, 1994).

County Performance Logic

The county performance logic is another tool for pulling together individual internships into a progressive and systemic consulting effort. The performance logic is based on the premise that the success of every business organization is based on a set of finite identifiable variables that affect a given output (Rummler, 1998; Rummler & Wilkins, 1999). Identifying and understanding these variables enables organizations to manage them intelligently. The purpose of the county performance logic will be to support interns in developing a system-wide network of essential variables that contribute to the county's (and each department's) performance. The county performance logic will consist of the performance logic map and a measuring system (Rummler, 1998; Rummler & Wilkins, 1999).

Performance Logic Map. The performance logic map will graphically display the system network of variables and their relationship. According to Rummler, it assists in the "reverse engineering" of performance; that is, the engineering of each job's performance backward from key outputs to the essential functions of the job. It

can also be used for troubleshooting performance problems. Rummler and Wilkins (1999) suggest that building a performance logic map occurs in these five general phases:

(1) Identifying the variables by creating a system view of the organization.

(2) Determining the apparent relationship between variables as they relate to the organization's strategy.

(3) Developing a draft performance logic map.

(4) Reviewing and refining the draft map with the executive team by asking the following questions: Are these the variables? Are these the relationships? What variables are critical to the organization's success? What is, or could be done to manage these variables? How do your current goals relate to these variables? What variables are currently being measured? How do your current corporate initiatives relate to these variables?

(5) Finalizing the performance logic map.

Performance Measurement System. According to Rummler, once critical performance variables have been mapped, the next step will be to build a measurement system to track these variables. In the PCIS, individual departments will use tracking forms to measure their performance with respect to a few critical variables. Interns will design these forms so they reflect each project's/department's key variables.

Performance Logic for County Government. The performance logic as a PCIS tool will have several functions. It will link the top and the bottom of the

organization by linking processes across the organization. It can consist of both financial and operational measures (see Kaplan & Norton's [1996] balanced scorecard). It will also provide interns and staff with the ability to troubleshoot performance and enable staff at every level to see how they impact and contribute to organizational performance.

Including the performance logic as a tool for supporting progressive PCIS consulting is based on the author's assumption that this concept is applicable not only to businesses but to county government as well. Government organizations are, after all, performance systems affected by a finite set of variables. It may take time to develop a county performance logic because the county provides a number of different services to constituents with wide-ranging needs. The typical county customer or the typical county service do not exist (e.g., Bohte & Meier, 2000). This may contribute to county government's lack of a "bottom line" (Stillman, 1987, p. 177). Finally, developing the logic map will take time because interns will add only pieces of it during each internship as they conduct their performance improvement projects. (If the PCIS starts out in a single department, the departmental performance logic may be put together faster and, thus, serve as a model for the entire county's performance logic.)

The county performance logic will be a living document to which interns will add variables and measures as they design, implement, and evaluate performance improvement projects. Table 9 suggests how PCIS interns might conduct the different phases of creating the county performance logic.

Table 9

Creating the County Performance Logic

Steps for creating a performance logic	How PCIS interns can do it
Identifying the variables by creating a system view of the organization	Identify one or two key variables per project
Determining the apparent relationship between variables as they relate to the organization's strategy	Link variables to departmental and county-wide strategic goals and objectives
Developing a draft performance logic map	Develop map over time as they add variables and departments
Reviewing and refining the draft map with the executive team	Review new variables with client, sponsor, and faculty advisor
Finalizing the performance logic map	A multi-internship process
Performance measurement system	Develop project-related measurement systems tracked by staff and interns

Technology Transfer Tracking Form

The success of the PCIS with respect to organizational performance improvement will depend not only on the degree to which interns develop, implement, and maintain interventions. Organization-wide implementation can also occur through staff efforts to improve work processes (e.g., Cohen & Brand, 1993;

Hatry et al., 1994; Lefevre, 1992). For example, after conducting a process mapping project, interns may teach staff how to develop and display process maps, or staff may conduct process mapping on their own without intern assistance. The technology transfer tracking form will be a means for interns to document these staff applications of HPT tools. Interns list the tool used by staff, how staff learned about applying that tool or process, and the project's outcome. This form will become part of the performance improvement library and will be updated as interns learn about staff's applications of HPT. It will also be used for evaluating the progress of the county's performance improvement. Interns may also invite staff to write about their application of performance improvement tools in the organization's newsletter.

Project Database

The project database will document the county's performance improvement projects conducted by PCIS interns. Its purpose will be to provide information about PCIS projects and their status so that future interns, and county staff as well, will be able to use it as a consulting and learning resource. Interns will add to the project database as they begin to work on their projects, including those variables they will add to the county performance logic. As is the case with the performance improvement library, the project database will enable subsequent interns to quickly familiarize themselves with the county's past performance problems and their solutions. The project database will also be used for each intern's year-end evaluation (described below). Over time, it will document the effectiveness of the

PCIS as a viable performance consulting option for the interning county government. Eventually, the sponsor may decide to track also non-PCIS projects to gain a comprehensive overview of the performance improvement expertise that may be developing within the organization.

In the interest of providing only value-adding tools, the project database will not require lengthy descriptions of project details. It will be based on Gilbert's (1996) levels of vantage and his performance engineering model. Similar to the performance logic covering entire departments or organizations, the performance engineering model will be used to reveal the logic of individual projects. The project database will link a project's goals to key performance measures and the method used to obtain these goal.

Summary. Implementation processes and tools will support individual internships by providing tools for learning and feedback with respect to HPT consulting in county government. They will also connect internships to form a progressive learning and consulting system. Tools to support individual internships will consist of the learning log, interview guide, feedback forms, relationship management, and the intern portfolio. Progressive support tools are designed to connect internships and will consist of the performance improvement library, county performance logic, technology transfer tracking form, and the project database.

Evaluation

Evaluation of intern performance and PCIS performance will occur in three phases (Figure 11). The continuous evaluation will assess intern learning and consulting throughout each internship; the end-of-internship evaluation will assess

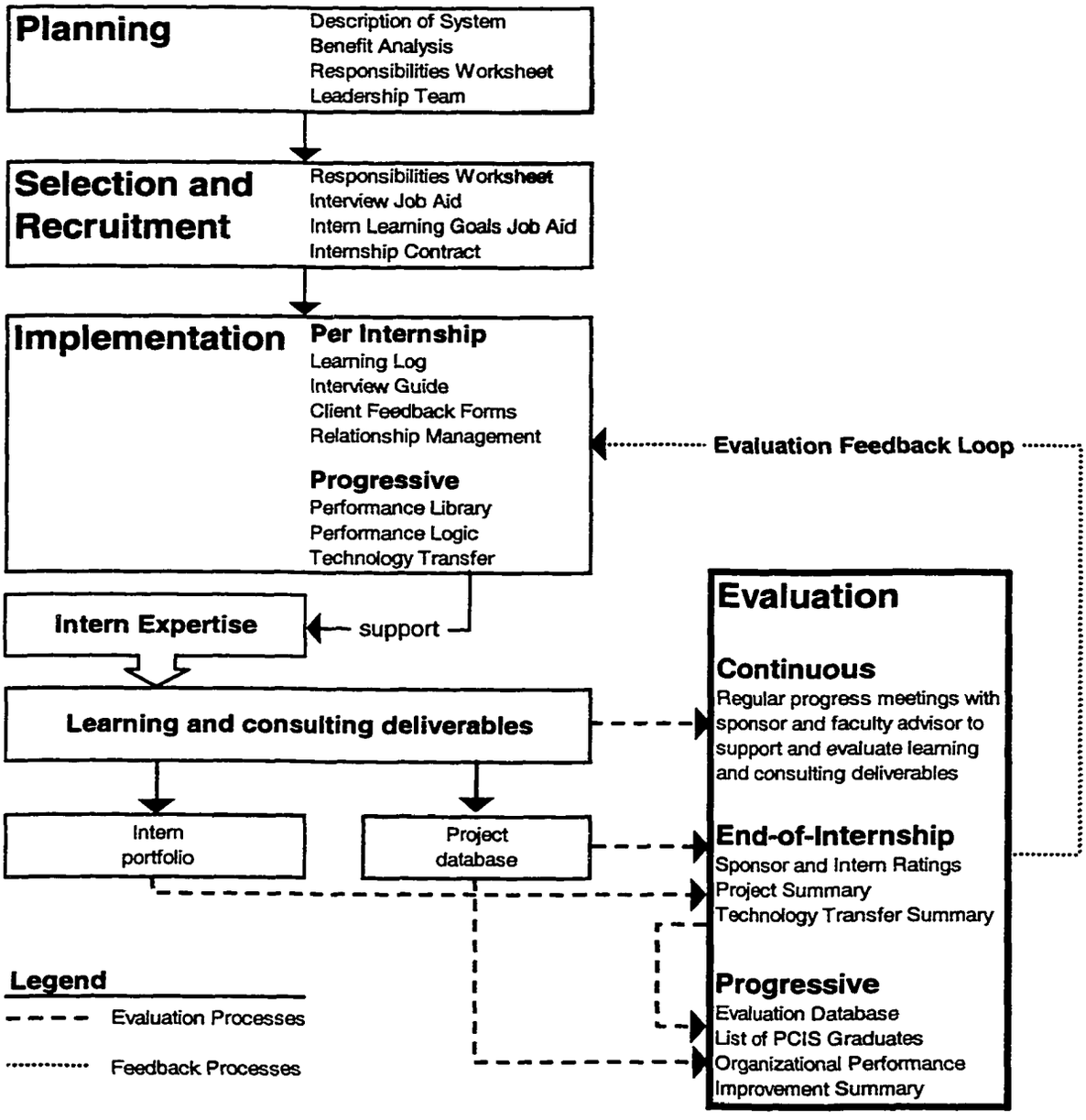

Figure 11. Processes and Tools for Evaluation.

intern learning, organizational performance improvement, transfer of human performance technology, and the PCIS support system; and the progressive evaluation will track interns' career success and the county's long-term organizational performance improvement.

Continuous Evaluation

The continuous evaluation will consist of regular progress meetings at which the sponsor and faculty advisor support and evaluate intern performance with respect to learning and consulting deliverables. These meetings may occur biweekly. These meetings may also be used to evaluate the PCIS itself. Interns will prepare a meeting agenda based on follow-up items from previous meetings, their deliverables, information items on project status, sensationals and how-abouts, and decision items that may require input from sponsor and/or faculty (e.g., prioritizing projects).

Progress Meetings with the Sponsor. Meetings with the sponsor will serve the purpose to review county-related sensationals and how-abouts from the learning log, such as items discussed at a meeting or questions about reading material provided by the sponsor. During these meetings, interns will brief their sponsors on the progress of all current and planned improvement projects. As part of the transfer of technology, interns may also provide their sponsor with information on performance technology as it relates to county government. Interns and sponsor may also discuss progress with respect to the progressive consulting support tools, such as the county performance logic.

Progress meetings will allow interns to interact with the sponsor in a consultant-client relationship. As a client, the sponsor may prioritize projects, allocate resources, or ask questions about interventions that will require interns to describe them in non-technical language. The ability to translate HPT jargon into the organization's language will be important for interns' consulting success, both during their internships and later during their professional careers.

During each intern's first progress meeting, the sponsor will explain the issue of confidentiality of specific communications between intern and sponsor and intern and other county staff. For example, the sponsor may advise interns which discussions can be shared with staff and which discussions should remain confidential.

Progress Meetings with the Faculty Advisor. Meetings with the faculty advisor will also involve reviewing products from support tools and project deliverables. The primary role of the faculty advisor in these meetings will be that of a subject matter coach. Interns may discuss questions about performance improvement projects and the application of specific HPT tools. The faculty advisor will review items interns wish to add to the performance improvement library and county performance logic. As part of the county-wide performance improvement database, these deliverables will affect future interns' learning and consulting and must be chosen carefully.

The faculty advisor will evaluate intern progress along some of the following dimensions: Does the intern apply familiar tools in new settings? Does the intern

apply new tools? Does the intern select the appropriate intervention? Is the intern making progress with relationship building and with the performance logic? Does the intern read relevant literature? Can the intern talk about this literature and the county projects in a way that shows an understanding of the application of HPT principles and tools? Does the intern get along with the sponsor and county staff?

The faculty advisor as administrator will discuss problems such as difficulties with the sponsor or difficulties receiving staff support. He or she will encourage interns to solve problems as independently as possible because it will prepare them to deal with similar problems in their future consulting careers.

Finally, progress meetings with the faculty advisor will serve to evaluate the support provided by progressive consultative internship system itself. Interns may find that certain tools need to be modified, deleted, or added.

End-of-Internship Evaluation

This evaluation will occur at the end of each internship. Its purpose will be to assess intern and sponsor perception of the quality of the internship. It will also provide a quantitative summary of the intern's transfer of technology and the intern's overall contributions to organizational performance improvement. Specific end-of-internship evaluation tools will be (1) sponsor and intern rating forms, (2) the project summary form, and (3) the technology transfer summary.

Sponsor and Intern Rating Forms. At the end of an internship, sponsor and interns will complete rating forms on which they indicate on a scale from 1 to 3 if the

internship met their expectations. The ratings are: 3 = exceeded expectations, 2 = met expectations, and 1 = did not meet expectations. Table 10 provides a list of statements to be included in this questionnaire. During their final meeting, sponsor and interns will discuss these ratings. Afterwards, interns tabulate the overall score and use it for the progressive evaluation (see below).

Project Summary Form. Interns will use the project database described earlier to create a history of all projects conducted by the current intern, including the continuation of previous interns' projects. The purpose of this summary will be to track organizational performance improvement for the specific internship and across internships. Interns will list each project they worked on, identify whether it was assigned by the sponsor or requested by other staff, which performance measures are in place now that were not in place before they began work on the project, the intervention, and whether performance improved since they (or a previous intern) put the measurement system into place.

Interns will analyze this information with respect to the percent of projects that (1) were new vs. continued projects, (2) were assigned vs. requested, (3) involved a new performance measurement system, (4) involved data collection, and (5) showed performance improvement. They will also indicate how many departments they worked with and how many projects involved interdepartmental or county-wide processes. They will then compare this information against the project summaries of previous interns so it shows a progressive history of the PCIS for that specific county

Table 10

Internship Evaluation Statements for Sponsor and Interns

Statements for sponsor	Statements for interns
Quality of progress meetings / facilitation of leadership team meetings / follow-up to leadership team and progress meetings	Sponsor was accessible
Intern provided fresh ideas and suggestions for performance improvement	Sponsor recommended readings and other resources
Intern communicated well with leadership team members / other department heads and officials / line staff	Sponsor offered training opportunities
Intern completed projects on time	Sponsor assigned challenging projects
Overall, how do you value intern's expertise?	Sponsor provided feedback about my performance
Intern made good use of the information you provided (county government, public sector performance improvement, etc)	The progress meetings were helpful
Intern showed an understanding of how your organization operates	Sponsor provided clerical support
Intern kept you informed about performance improvement projects throughout the organization	I accomplished my learning goals
	I learned a lot from doing the projects
	I received support from the staff
	I felt accepted as member of the organization.
	My project load was manageable
	I had opportunities to make presentations about HPT
	I had opportunities to facilitate meetings
	Overall, I am satisfied with my internship

organization. Interns will include an updated copy of the county performance logic on which they will indicate which measures they added during their internship.

Technology Transfer Summary. This tool for the end-of-internship evaluation will be a one-page summary of interns' accomplishments with respect to transferring human performance technology to county staff. Interns will use the technology transfer tracking form described earlier to generate this summary. The summary will list the HPT tools, the project(s) they were used for, and subsequent applications by staff.

Evidence of successful transfer of technology may not become evident during a single internship. For example, county staff may readminister a survey developed by intern after that intern has left; this event will be recorded by the next intern as an instance of technology transfer. Thus, technology transfer will be assessed within and across internships.

Progressive Evaluation

The purpose of the progressive evaluation will be to track whether the system is achieving its purpose of connecting intern learning and organizational performance improvement in the long-term. It will consist of (1) the evaluation database, (2) a list of PCIS graduates, and (3) the organizational performance improvement summary.

Evaluation Database. The purpose of this database will be to track individual end-of-internship evaluations. Interns will add summaries of their and their sponsor's end-of-internship ratings and their project summary form into the PCIS evaluation

database. This database will consist of all evaluations conducted for the progressive consultative internship system. The faculty advisor and interns will review this database and note if trends suggest changes in intern performance over time.

List of PCIS Graduates. Internship research has shown that the main benefit of completing professional internships is its positive effect on interns' entry into the job market. In comparison to their non-intern peers, many interns obtain a desired job faster, with a preferred organization, and/or with higher entry salaries (e.g., Peterson's, 1997; Taylor, 1992). Therefore, the success of the PCIS should not only be measured by what interns will accomplish during their PCIS internships, but also if they will be successful afterwards.

The list of PCIS graduates will track the following information: previous interns' names, dates of their internships, university graduation dates and degrees, and post-graduation positions. Interns will collect this information via brief e-mail surveys toward the end of their internship so that they can obtain career information from the previous PCIS graduate. Previous interns will be free to indicate their salaries. Although more variables than a one-year internship contribute to job success, the faculty advisor may be able to use this database to recruit students into the internship system or the department.

Organizational Performance Improvement Summary. This assessment will focus on the internship system's impact on the interning county's performance improvement. The purpose of this evaluation will be to track the progression of the organizational performance improvement. For example, the first one or two interns

may work on projects to "put out fires;" over time, interventions will begin to focus on establishing model change processes that enable county staff to prevent fires by supporting good performance and planning continuous performance improvement.

Interns will use the project database, the county performance logic, and the end-of-internship evaluation database to document this progression. They will complete a summary similar to the individual internship's project summary form except that this summary form will trace performance improvement consulting outcomes since the first intern.

The internship system will be considered successful in the long term if a high percentage of PCIS interns establish successful careers, when the county's list of documented performance improvements grows longer each year, and when projects become more comprehensive with respect to addressing systemic performance issues. For an outsider's perspective, the faculty advisor may ask colleagues to evaluate if the PCIS projects show a trend to more important and systemic projects over time.

Summary. The evaluation of the progressive consultative internship system will occur through three distinct but interrelated processes: continuous, end-of-internship, and progressive evaluations. Throughout each internship, sponsor and faculty advisor will regularly review intern learning and consulting deliverables. Interns will also use client feedback to improve consulting performance. The evaluation at the end of each internship will provide a summary of interns' accomplishments. The progressive evaluation will track interns' career success and assess the progressive nature of the organizational performance improvement.

General Systems Principles

The literature review conducted for this project identified seven general system principles that should guide the design of the internship system (Table 7). Using a behavioral systems approach to designing an internship model that will benefit not only interns but also the sponsoring organization guided the design so that it will incorporate elements that support interns' learning and consulting in large organizational performance systems. Table 11 functions as a checklist to validate that design elements and tools addressed each systems principle.

Chapter Summary

The progressive consultative internship system differs from traditional internships in that it attempts to balance between services the organization provides for the intern (i.e., learning opportunities and resources) and the services interns provide for the organization (i.e., performance consulting). Typically, internship programs are built around the time frame of individual internships. The present internship system goes beyond this time frame as it will support its users in a long-term performance improvement effort.

Table 11

General Systems Principles and Internship System Design Elements

General systems principle	Internship system design element
1. Open systems	Description of system, responsibilities worksheets for all users, continuous evaluation and feedback
2. Information processing	Performance improvement library (with orientation to organization), relationship management, technology transfer, performance logic
3. Guided systems	Description of system, intern learning goals job aid, internship contract
4. Adaptive systems	Client feedback, relationship management, performance logic, technology transfer tracking form, continuous evaluation
5. Energy channeling	Description of system (with goals and benefits), progress meetings
6. Environmental intelligence	Performance improvement library, relationship management, technology transfer tracking form, performance logic, continuous, end-of-internship, and progressive evaluation tools
7. Subsystem maximization	Continuous, end-of-internship, and progressive evaluation tools

The purpose of the progressive consultative internship system is to connect intern learning and organizational performance improvement. It is based on the two

assumptions that interns can effectively contribute to long-term organizational performance improvement in county government and that this performance improvement can be achieved by linking consecutive internships into a progressive learning and consulting system. The PCIS will provide processes and tools that connect individual internships into a cohesive long-term consulting effort that will eventually encompass the entire county system. The next chapter describes methods for evaluating the quality of the system's design.

CHAPTER IV

METHOD

Evaluation of the Design of the Progressive Consultative Internship System

This chapter describes the evaluation of the quality of the design of the progressive consultative internship system (PCIS). The evaluation consisted of a two-tiered approach: Evaluation I tested the assumption upon which the design was built, namely, that HPT interns can effectively consult in a county government organization. It involved a quantitative analysis of data collected from the author's internship at Kalamazoo County Government. Evaluation II was a qualitative assessment of the utility and the feasibility of the design of the internship system (chapter III). Experts selected from each of the three user groups (i.e., sponsor, faculty advisor, and intern) reviewed the design and judged its quality. The chapter begins with an overview of the roles of evaluation and general evaluation functions. It then discusses the role of the author as evaluator before describing in detail the methods for Evaluation I and Evaluation II.

Two Roles of Evaluation: Formative and Summative

Evaluation research distinguishes between two roles of evaluation, the formative and summative roles (e.g., Rossi et al., 1999; Worthen et al., 1997). In

general, formative evaluations are used to improve a program while summative evaluations are used by stakeholders and/or consumers to make decisions about a program's future. The testing reports published by *Consumer Reports* are examples of summative evaluations.

Typically, formative evaluations should occur throughout all program phases, such as its design, development, and implementation (e.g., Brethower & Smalley, 1998; Brinkerhoff, 1987; Van Tiem et al., 2000; Worthen et al., 1997). Ongoing, or built-in, evaluations can optimize program design and development. Worthen illustrates the importance of the formative evaluation as follows: Consider "the foolishness of developing a new aircraft design and submitting it to a 'summative' test flight without first testing it in the 'formative' wind tunnel" (Worthen et al., 1997, p. 15).

In practice, however, no clear line separates the conceptual distinction between formative and summative evaluations. For example, programs that continue after a summative evaluation may use those evaluation data for formative purposes (i.e., program improvement). The present evaluation is an example of such a hybrid. Its main purpose was formative: to determine how to improve the design of the system; but it also included a summative judgment of the design's quality.

Overview of Evaluation Functions

The evaluation of programs is based on "the commonsense idea" that these programs should have demonstrable benefits (Berk & Rossi, 1990). Specifically,

evaluation is the "identification, clarification, and application of defensible criteria to determine an evaluation object's value (worth or merit), quality, utility, effectiveness, or significance in relation to those criteria" (Worthen et al., 1997, p. 5). It is good practice to integrate evaluation into all phases of a program and not merely conduct it as an afterthought (e.g., Brethower & Smalley, 1998; Brinkerhoff, 1987; Van Tiem et al., 2000; Worthen et al., 1997). Depending on the particular program or project phase, evaluations can have different functions, such as needs assessment, assessing program design, implementation assessment, impact assessment, and cost assessment (Rossi et al., 1999). Table 12 summarizes the purpose of each of these evaluation functions. The current project, the design of the PCIS, involved the first two evaluation functions, needs assessment and design evaluation.

Needs Assessment

The needs assessment for the PCIS consisted of reviewing internship, consulting, and public sector performance improvement literatures (see chapter I). This review suggested that a consultative internship system for county government organizations could provide county government with access to a low-cost performance consultation alternative while providing HPT graduate students with relevant practical learning experiences. The present chapter focuses on the second evaluation function, the design evaluation.

Table 12

Purpose of Major Evaluation Functions
(based on Rossi et al., 1999)

Evaluation function	Purpose
Needs assessment	Assesses the social conditions a program is intended to address and determines whether there is a need for a new program.
Design evaluation	Assesses the program's conceptualization and design and whether it presents a plausible and feasible plan for achieving the program's goals. This evaluation requires a clearly articulated program theory. Also known as assessment of program theory.
Implementation assessment	Answers how closely the program is delivered to the target audience as intended.
Impact assessment	Assesses if the program is having the desired effects. Also known as outcome evaluation.
Cost assessment	Assesses whether the program attained its effects at a reasonable cost. Typically conducted as cost-benefit and cost-effectiveness analysis.

Design Evaluation

As noted earlier, ongoing evaluation throughout all phases of program development and implementation increases the probability that programs achieve their targeted benefits. The current project consisted of the design of the progressive consultative internship system. The next phase would involve the development of the

internship system and its tools. However, it would be unwise to proceed with the system's development without having first assessed the soundness of the design. It is, therefore, paramount at this stage to conduct a thorough evaluation to lay open the design's strengths and weaknesses, and to find ways for improving it. This was the purpose of Evaluations I and II.

Requirements for Conducting Design Evaluations

A program design's critical assumptions and expectations can only then be evaluated if they are clearly identified and described (Berk & Rossi, 1999). The description should illuminate the processes and sequences through which program components are presumed to ultimately produce the desired benefits. However, no standards exist for describing a program's design and its logic, and one may find a number of different ways to describe a design logic. For example, Rossi et al. (1999) report that these descriptions may include logic models, program models, outcome lines, cause maps, and action theories. Chapter III identified and described the PCIS design's purpose, assumptions, goals, benefits, and methods in detail, using both text and graphics.

The Role of the Author as Evaluator

An evaluator's primary responsibility is to collect and interpret information for improving a program and making enlightened decisions (Worthen et al., 1997). Thus, the evaluation must provide credible information that is acceptable to the

evaluation's stakeholders. The evaluator in the present study was also the study's author. He conducted the data collection for both Evaluation I (assumption) and Evaluation II (design). Evaluation I data consisted of quantitative county government performance data, qualitative evaluations by the author's clients, and documentation of technology transfer, among others. For Evaluation II, the author asked experts to answer specific design evaluation questions and render a summative judgment about the design. These experts were the de facto evaluators of the PCIS design; the author's role was to analyze and present their findings and to draw conclusions with respect to improving the design. The remainder of this chapter describes in detail the methods for Evaluations I and II.

Evaluation I: Testing the Assumption that HPT Interns Can Consult Effectively in a County Government Organization

As noted in chapter III, the progressive consultative internship system builds on the assumption that HPT interns can function as effective performance consultants to county government. This section describes evaluation questions and criteria, method and data collection procedures, data analysis techniques, and evaluation standards for judging the effectiveness of the author's consultation.

It is important to note that the author's internship represents a case study. It offers benefits of the case study approach, such as detailed information about variables and processes involved in the consultation. It also bears its limitations; for example, it only allows limited generalization to PCIS-based internships.

Evaluation Questions and Criteria

Evaluation I addressed the novel aspect of the proposed internship system: casting the learner in the role of performance consultant. Because the concept of a performance consulting internship was new, it was important to assess if interns can, in fact, perform in the role of performance consultants. Many consultants' engagements with their clients end when they provide recommendations for solving the clients' problems. For example, an extensive $238,000 analysis of Kalamazoo County's criminal justice system yielded a final report with 83 recommendations that fill over 300 pages (Institute for Law and Policy Planning, 2000). This report was the consultant's final deliverable and completed his obligations to the county.

It is the hallmark of HPT consultants, on the other hand, to assess their consulting success based on the performance of their client organization (e.g., Addison, 2000; Stolovitch & Keeps, 1999b; Van Tiem et al., 2000). The present evaluation of the author's consultation at Kalamazoo County attempted to follow this HPT characteristic.

Therefore, the evaluation questions for Evaluation I focused on the author's impact on the county's performance: "Did the author contribute to performance improvement at Kalamazoo County Government or its subsystems?", "How did the author achieve this impact, if any?", and "What is the evidence?" Examples of the author's contributions included performance improvement, development of performance measurement systems, and transfer of HPT technology to the

organization. Process measures documented the author's activities as dimensions of the consulting process.

Evaluation Criteria

The selection and development of evaluation criteria for the author's consulting outcomes was based on Gilbert's (1996) work on creating and measuring human performance. The concepts of vantage levels and the performance engineering model provided the framework for developing specific performance-based evaluation criteria for the author's projects.

Levels of Vantage for Evaluating Human Performance. Gilbert (1996) notes that in order to make sense of human performance, it is important to agree on the vantage point from which to evaluate that performance. Gilbert developed six levels of vantage that address general types of accomplishments for interrelated performance systems. Table 13 lists six levels of vantage, their performance models, and examples of performance systems.

Logically, these levels of vantage are connected in two ways: (1) top-down from the philosophical level to the logistics level and (2) bottom-up from the logistics level to the philosophical level. The top-down logic asks the question "How can I achieve the model for this level of vantage?" (Answer: by achieving the models at each lower level.) The bottom-up logic asks the question "Why is the model at this level of vantage important?" (Answer: to support performance at the next higher level.)

Table 13

Six Levels of Vantage (based on Gilbert, 1996)

Level of vantage	Performance model	Performance system
Philosophical	Ideals that relate to the quality of life, transcend specific cultures or politics, and require specific goals if they are to be achieved.	Human identity
Cultural	Goals of the particular culture that give performance its meaning, and require policies if they are to be reached.	Culture, state
Policy	Missions that define the basic purpose of institutions and subcultures, and require programs of action.	Institutions, organizations (subcultures)
Strategy	Responsibilities that define the roles of the members of an institution, and require plans for fulfilling them.	Roles and jobs
Tactics	Duties that must be fulfilled to discharge the responsibilities of any role or job, and require tools for its execution.	Tasks and skills
Logistics	Supplies of resources needed to execute the tasks required by a duty.	Implementation schedules

Figure 12 shows how the levels of vantage and their logic apply to the author's internship at Kalamazoo County Government. The six levels of vantage provide the overall framework for developing the criteria for measuring the author's

consulting outcomes. It can be considered the value chain of the author's consultative internship.

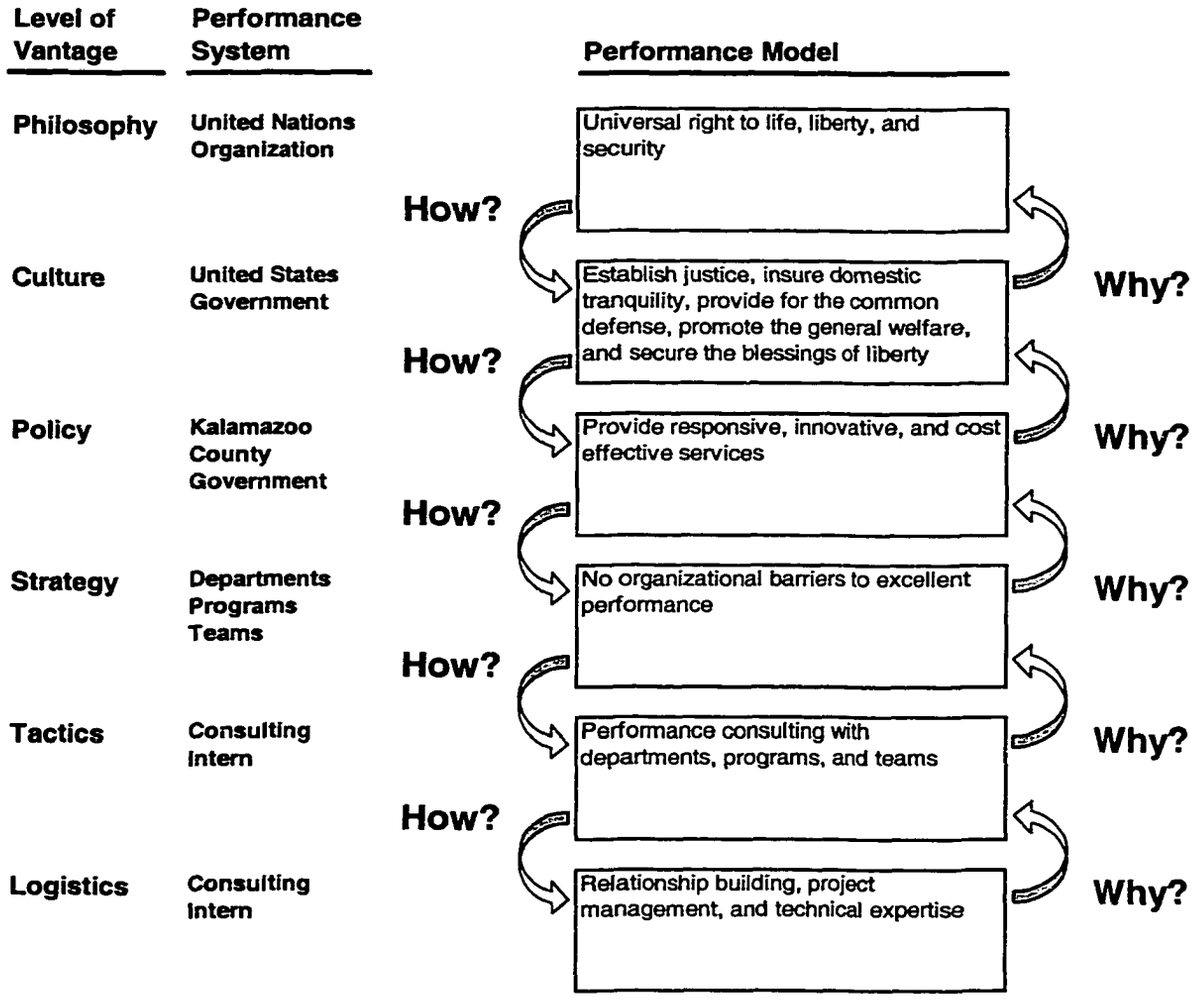

Figure 12. Levels of Vantage for Author's Internship at Kalamazoo County Government.

The top-down logic asks "How can I achieve the model at each level of vantage?" The bottom-up logic asks "Why is this model important?"

The performance models at the logistics level (e.g., relationship building and project management) are necessary to achieve the models at the tactics level (e.g., effective performance consulting). These models, in turn, can contribute to achieving the outcomes at the strategy level (e.g., elimination of organizational performance barriers). Removing organizational barriers, then, supports the county's effort to achieve the performance model at the policy level (e.g., service delivery).

Performance Engineering Model. Gilbert (1996) suggests further that most HPT practitioners are not concerned with all six levels of vantage. Instead, they focus on the policy, strategy, and tactics levels. They do so because these levels require the most detailed attention for designing or evaluating organizational performance. These three levels form the performance engineering model (Gilbert, 1996, p. 137). Table 14 shows the practitioner's performance engineering model as it applies, in general, to the author's consulting internship. It adds performance criteria and performance improvement methods to the levels of vantage shown in Figure 12.

Note the similarity between the logic of the performance engineering model and the logic of the proposed internship system's program theory (chapter III). The performance engineering model, too, seems to indicate causal relationships from one level to the next. These relationships are not causal, however. Rather, the performance engineering model shows how specific accomplishments at one level of vantage are necessary to support accomplishments at the other levels. In order to pursue the models at the highest levels of vantage, the lower levels have to be in place and functioning.

Table 14

Generic Performance Engineering Model for Author's Consultative Internship at Kalamazoo County Government

Performance system	Performance model	Performance criteria	Performance improvement methods
Kalamazoo County Government (Policy)	Provide responsive, innovative, and cost-effective services	Cycle time and cost per service or internal process Citizen satisfaction index	Continuous improvement Innovation
Departments, programs, teams (Strategy)	No organizational barriers to excellent performance	Cycle time and cost for key processes	Key processes identified Performance support Performance tracking
Consulting intern (author) (Tactics)	Performance consulting	Projects with technology transfer Client satisfaction index	Human performance technology

Gilbert (1996) cautions that a specific performance engineering model (e.g., Table 14) can list only some of many possible subsystems contributing to the performance model at each of the vantage levels. Each level contains additional subsystems and variables that affect departmental and organizational performance. With respect to the author's internship, the author controlled, to a large degree,

outcomes at the tactics level. That is, through his application of human performance technology, he generated deliverables that were accepted by his clients and that contributed to his clients' projects (see chapter V). Departmental and organizational performance at the strategy and policy levels, respectively, were affected by additional variables, such as political agendas, staffing levels, funding, utilization of technology, supervisory practices, and state and federal mandates. The author could not control these variables; he attempted, however, to influence them by recommending to his clients relevant implementation strategies and measurement techniques.

Block (2000) notes that

> Implementation does not actually begin until the people who do the work decide whether they are going to make real changes or simply go through the motions. Real changes require real commitment, and part of [the consultant's] role is to fire that spark. (p. 249)

This quote characterizes the author's position as intern in Kalamazoo County Government because a large part of his job was to work with elected officials, department heads, and line staff to get their commitment and support for the county's quality improvement initiative.

Measures of Performance, Process, and Accomplishment. Another way of looking at the performance engineering model's three levels of performance is to view them with respect to performance, process, and accomplishments. The policy level represents the performance that is ultimately desired by the client; thus, outcome measures at this level can be considered performance measures. The strategy level represents the component process(es) that must be in place in order to achieve the

desired performance at the policy level; thus, outcome measures for this level can be considered process measures. Finally, the tactics level represents accomplishments the author must generate in order to influence process improvement at the strategy level; thus, outcome measures for this level can be considered accomplishment measures. This terminology was adopted here for describing the author's projects and their results.

Summary. Evaluation questions about the author's consulting effectiveness must be judged by performance criteria that take into account the different levels of vantage. In order to achieve performance improvement for the organization (policy level), the author had to successfully apply human performance technology processes (tactics level) and work within organizational constraints to implement the intervention (strategy level). The present evaluation of the author's consulting effort addressed each of these vantage levels.

Evaluation Method

This section provides information about the author's internship setting and describes in detail three projects selected for evaluation. In addition, cross-project consulting dimensions that provide information about the author's cross-project consulting efforts are specified.

Description of Author's Internship Setting

Kalamazoo County is located in Southwest Michigan and covers 562 square miles. It has a population of approximately 235,000. The political body of the county contains 25 units of government: county government, 3 cities, 6 villages, and 15 townships.

Kalamazoo County Government. Kalamazoo County Government consists of 26 departments ranging in size from one staff (Purchasing) to more than 200 staff (Human Services Department). With approximately 1,000 employees, Kalamazoo County Government is the tenth largest employer in the county ("Kalamazoo County top employers," 2000). Its total general operating budget for 2000 exceeded $68,000,000 (Kalamazoo County, 1999).

Figure 13 (one of the author's consulting deliverables) provides an overview of the organizational structure of Kalamazoo County Government. The elected political leadership consists of nine elected part-time Commissioners who form the Board of Commissioners, six elected officials who function as department directors (with the exception of the Surveyor), and the elected judiciary of the Circuit, District, and Probate Courts. The County Administrator, appointed by the Board of Commissioners, functions as the Chief Executive Officer accountable only to the Board. The current County Administrator, Randolph D. Terronez, sponsored and directly supervised the author during his internship. Mr. Terronez was also the collaborating investigator for the author's dissertation project (Appendix D).

Kalamazoo County Government

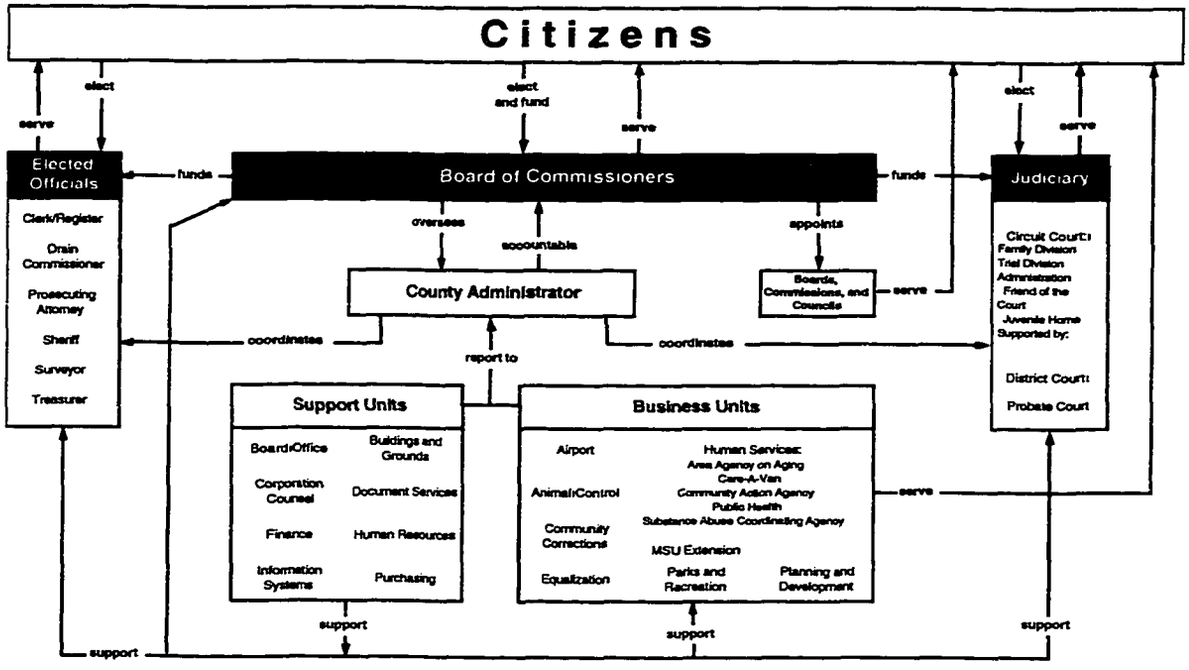

Figure 13. Organization Chart of Kalamazoo County Government.

Source: Kalamazoo County (2000) [On-line]. Available at: http://www. kalcounty. com/orgchart.htm

Performance Improvement at Kalamazoo County Government. The Board of Commissioners appointed the current County Administrator in November 1998. Based on his experience with quality improvement efforts at other counties, the County Administrator planned to introduce a county-wide continuous quality improvement initiative to Kalamazoo County Government. He considered the following two options for getting the initiative off the ground: (1) hiring an external consultant and (2) collaborating with a local organization to help Kalamazoo County with this process. He decided against these options for two reasons. First, he

observed that in the consultant approach "organizations spend an inordinate amount of time on theory in a classroom setting and never getting [sic] around to practicing what they learned." Second, a "cursory scan of the Kalamazoo community initially indicates that there are no public sector entities actively involved in this process on an organization wide basis" (Terronez, January 11, 1999). Instead, he decided to hire an intern to support the county-wide quality improvement initiative.

Based on the Prosecuting Attorney's positive experiences with a doctoral HPT intern from the same graduate program as the author (Appendix A), the County Administrator recommended a consultative internship. The Board of Commissioners created this position unanimously with the following motion: "That the Board of Commissioners approve the creation of a temporary student intern position dedicated to working on the County-wide Continuous Quality Improvement project" (Kalamazoo County Board of Commissioners, January 19, 1999). On July 12, 1999, the author began his internship as a part-time temporary employee of Kalamazoo County Government.

The Author's Role at Kalamazoo County Government. The author's job description, co-developed by the County Administrator and the author, states the following major responsibilities in accordance with the Board's mandate: (1) to support the County Administrator and the Continuous Quality Improvement Steering Team, (2) to champion County CQI within and outside county government, and (3) to facilitate departmental performance improvement (Terronez, July 21, 1999).

The initial title for the author's internship position was Continuous Quality Improvement Intern (Terronez, July 21, 1999). After two weeks, the County Administrator changed the job title to Coordinator to reflect the status of quality improvement within county government. (Generally, the title Coordinator denotes a mid-level professional position within the county's classification system.)

Projects Selected for Evaluation. The projects described below were selected for evaluation purposes because they exemplify the range of the author's three major responsibilities. They are (1) the county-wide continuous quality improvement initiative, (2) the internal grant review process, and (3) the outbreak investigation process (for a complete list of projects see Appendix E). Projects 1 and 2 provided the opportunity to collect post-intervention data within the data collection time frame specified below. Although project 3 involved the installation of a performance measurement system and the collection of baseline data, the absence of post-intervention outbreaks of food-poisoning did not allow the implementation of the intervention. It was included here because the project was conducted with a single intra-departmental client and because it illustrated the application of HPT with respect to low frequency but important tasks.

Project descriptions include the author's consultation, the consultation outcome and deliverables, and the data collection methods. Data collection began in July 1999 following the beginning of the author's internship and ended December 31, 2000; thus providing data for more than 17 months of intern consulting. Following the detailed description of projects 1 through 3 are specifications of several consulting

dimensions that span across the author's projects, namely, relationship building, project lineage, transfer of technology, and data collection and performance measurement systems.

Project 1: County-Wide Continuous Quality Improvement (County CQI)

One of the author's main tasks as Kalamazoo County's Continuous Quality Improvement Coordinator (CQI Coordinator) was to support the County Administrator and CQI Steering Team in introducing all 1,000 employees at county government to continuous quality improvement. The Steering Team consists of fourteen front-line, professional, and managerial staff. Team members had varied experiences and backgrounds with respect to quality improvement. For example, some team members had actively introduced team building, problem solving, and strategic planning to their departments while other team members were not at all familiar with CQI. The team's initial one-year task was to develop and implement a strategy for the county's quality improvement initiative.

Consultation. The County Administrator's goal for the author's internship was to introduce all team members to CQI, to support the team's development of a county-wide strategic improvement plan, and to orchestrate the roll-out of CQI to all county staff. The author supported the team by preparing and conducting education and planning meetings, executing the team's decisions, and working with the team on special projects, such as the county's first CQI survey. The author used several channels to expose county staff to the CQI initiative, such as newsletter articles,

monthly updates to department heads and elected officials, presentations, and reports to the Board of Commissioners.

Consulting Outcomes and Deliverables. Supporting the County Administrator and CQI Steering Team and promoting CQI within county government involved fundamental consulting activities such as building relationships with both executive and front-line staff and managing a large number of projects, not all of which were directly related to closing immediate performance gaps. For example, the author developed and conducted presentations, designed brochures for county employees and citizens, and created a new organization chart, efforts that were not designed to close immediate performance gaps. Building a relationship network among decision makers in county government and managing a number of parallel projects were essential ingredients of the author's attempt to support the county's continuous quality improvement initiative. These processes were common to all of the author's consulting projects. Table 15 lists the author's consulting projects with the CQI Steering Team, their deliverables, and the criteria for evaluating the consulting outcomes.

As defined in chapter III, transfer of technology refers to the incorporation of HPT tools or their products in county documents (e.g., the application of the behavior engineering model resulted in the CQI strategic) and the use of HPT tools by county staff (e.g., process mapping, customers surveys).

Table 15

Author's Consulting Projects for the CQI Steering Team

Project component	Description	Deliverables	Criteria
CQI team education	Bring all team members up to date on quality improvement	Exercises and presentations	Technology transfer
CQI Strategy: Development and communication	Assist CQI Steering Team in developing strategy for implementing county-wide quality improvement	Strategic mission, goals, and objectives	Technology transfer Acceptance ratings
Dissemination of County CQI	Inform officials and staff about County CQI	Reports Presentations Newsletter articles	Size and type of audience Audience feedback Number of articles Number of authors
CQI survey	Support CQI team in developing, conducting, analyzing, and reporting first CQI survey	Survey instrument Survey analysis Survey report	Technology transfer Return rate compared to other county surveys

Table 15—Continued

Project	Description	Deliverables	Criteria
CQI self-study	Develop means for CQI team to assess departments' CQI efforts in relation to strategic CQI goals	Self-study instrument Pilot studies	Technology transfer
CQI grant program	Develop and promote program providing funds for CQI projects	Grant application packet	Technology transfer Number and type of grant applications
Inventory of CQI expertise	Determine all departments' past and current quality improvement efforts	Graphic and written inventory	Technology transfer

Of the projects listed in Table 15, the development and county-wide communication of the strategic quality improvement plan was the County Administrator's priority. That is, the development of specific improvement projects by the team were not to not occur until after the strategic plan was communicated to all county employees. This rollout process occurred between October and December 2000; some additional roll-out presentations during the early part of 2001 were planned for staff who missed the initial series.

CQI Education. When the author joined Kalamazoo County Government in July 1999, the CQI Steering was meeting once per month for approximately 1.5

hours. However, the author realized that this low frequency of team meetings was not conducive to addressing both business and education issues. Business issues included the development of a team mission and overall CQI strategy, communication and interaction with the county's employees, and team membership and recruitment issues; education issues included learning about CQI tools and processes applicable to the public sector. The author suggested to add one meeting per month for educational purposes. The team agreed and conducted its first education meeting in September 1999.

Education meetings began with three meetings during which the team viewed a video series about total quality management (TQM). The author previewed these videos and provided team members with outlines and a note-taking job aid modeled after Brethower's sensationals and how abouts (D. M. Brethower, class material, January 6, 1998). Following the video series, the author conducted presentations and instructional exercises that involved Brethower's total performance system (Brethower, 1972, 1982, 1995) and Gilbert's behavior engineering model (BEM; Gilbert, 1982, 1996).

As suggested by the team, the author also arranged presentations by public sector and non-profit organizations about their experiences with organizational performance improvement. In January 2000, the county administrator and two staff from Washtenaw County, Michigan, presented their county's performance improvement process to the CQI Steering Team and, in a separate meting, to Kalamazoo County officials. In March 2000, the CQI Steering Team visited

Kalamazoo's Lakeside Treatment and Learning Center. Lakeside's executive director provided details about the non-profit organization's efforts toward achieving measurable performance improvement.

Team Mission. Based on the notion that every performance system must have a goal (Brethower, 1972, 1982, 1995; Malott & Garcia, 1987), the author introduced team members to strategic planning by beginning with developing the team's mission statement. The author provided team members with Brethower's (1984) goal statement job aid (Appendix F; for applications see LaFleur & Brethower, 1998) and the then current Kalamazoo County's mission statement. He then asked team members to link the team's mission to the county's mission statement (Appendix G).

CQI Strategy: Development and Communication. The author's sponsor viewed the development of a county-wide continuous quality improvement strategy as the main goal of the author's work with the CQI Steering Team. This was a difficult assignment because of the author's inexperience in organization-wide strategic planning. The author used the CQI team mission and the behavior engineering model as a foundation for developing the CQI strategic mission, goals, and objectives. This strategic planning effort became the foundation for a series of other CQI projects, such as the CQI survey, CQI grant program, and the CQI self-study (see Table 15).

CQI Strategy: Behavior Engineering Model Exercise. The behavior engineering model exercise was reported by Dean (1997b) as an exercise for private sector employees. The goals of the exercise were to "introduce the concept of

nontraining performance needs, sell the importance of nontraining performance improvement strategies and systems, prepare managers for needs assessment results that might be related to the work environment, and introduce the behavior engineering model itself" (Dean, 1997b, p. 52).

These four goals were directly relevant to the author's effort to educate the team about human performance. During the exercise, the author provided team members with a sheet of paper, titled "Where is my biggest performance block?" Participants were then asked to indicate improvement in which of the following areas would enable them to do their job better:

1. Clear performance expectations about my performance and/or relevant and timely feedback about the adequacy of my performance.
2. Tools, resources, and materials to achieve my performance goals.
3. Adequate pay and non-pay incentives/rewards based on my performance.
4. Systematically designed training that matches the requirements of my job.
5. A match between my skills and the requirements of my job.
6. Assurance of job security and social acceptance.

This exercise and the BEM became the foundation of the CQI strategy. In February 2000, the team finalized the county-wide CQI mission and strategic goals (Appendix H).

<u>CQI Strategy: Senior Management Buy-In</u>. During the county's annual strategic planning sessions in March of 2000, two CQI Steering Team members (one department head and one top-level administrator) used a presentation developed by

the author to introduce the CQI strategy to the county's appointed and elected officials (Session 1) and the Board of Commissioners and executive staff (Session 2). During Session 1, the author was invited by the facilitator to use the OptionFinder System by Option Technologies Interactive, LLC, to ask the audience questions about the county's CQI strategy. Option Technologies Interactive, LLC, describes this innovative communication system as follows:

> The OptionFinder System is a combination of software and interactive wireless keypads used to improve group communications in face-to-face meetings. The keypads are handed out to meeting participants. During the course of the meeting, users pose a question or statement to the participants, along with a set of response choices, all of which is [sic] projected on to a large screen. The participants press the keypad number of the response that matches their opinion. The software takes the keypad responses and instantly produces a graph of the results. The graph is then projected before the group for all to see.
> (Available: http://www.optionfinder.com/product.line/product.content.html)

Table 16 lists the questions and answer options provided during these sessions. Note that the facilitator criticized option (5) of the second question; he subsequently removed it prior to Session 2 without the author's knowledge. (At Session 2, participants suggested to add an "all of the above" option in the future.)

CQI Survey. While developing the CQI strategy, the CQI Steering Team decided to conduct a survey of county employees to assess the current state of CQI in county government with respect to the emerging CQI goals. The author formed a task force with three volunteers to conduct the survey; none of the task force members had experience in quality improvement or survey design. He assisted in developing, conducting, analyzing, and reporting the results.

Table 16

Questions About County CQI Asked by Author at Kalamazoo County's Strategic Planning Retreats, March 2000

Questions about county's CQI initiative	Answer options
The role of county CQI in implementing the county mission and goals and improving service quality is . . .?	(1) very important, (2) important, (3) somewhat important, (4) not important, (5) just a fad . . . it too shall pass
Who should be part of county CQI?	(1) Elected officials, (2) department heads, (3) all staff, (4), citizens, (5) all of the above
My role in county CQI . . .	(1) Leader, (2) participant, (3) not participate

Since the CQI Steering Team was concurrently developing the CQI strategy based on Gilbert's behavior engineering model, the author provided BEM-related material to the task force, such as excerpts from Gilbert's publications (Gilbert 1982, 1996). The task force generated a series of items centering around the model's six cells (Appendix I) and discussed their fit with the model. For example, the large number of items in Cell 1 was a result of the fact that Cell 1 captures a wide range of topics, such as instruction, feedback, processes, and information (see Table 3). The items in Cell 3 were included only after discussing the particular rationales for their merit as incentives: Annual performance appraisals are linked to annual salary increases, CQI suggestions will most likely decrease in frequency if the supervisor

does not provide supportive or corrective feedback, and employees will not sustain high levels of performance and morale unless they receive regular rewards from their supervisor. Because supervisors cannot use discretionary monetary rewards, the final survey instrument included a line for respondents to indicate how their supervisors reward them for "a job well done" (Appendix J).

From a behavioral perspective, these incentives represent weak and delayed consequences. However, the task force felt, based on their own experience and observations, that effective (and well-liked) department heads and supervisors frequently use all three of these types of incentives.

The author suggested to survey a random sample rather than the entire employee population. Although the survey literature provides formulas for determining the appropriate sample size, it does so with respect to knowledge of previously established population estimates and the desired degree of sampling error (e.g., Dutka, Frankel, & Roshwalb, 1982; Mendenhall, Ott, & Scheaffer, 1971; Rosander, 1977). Because this was the first county-wide CQI survey conducted and because it was also the first random sample survey conducted on a county-wide basis, the author and the task force decided to survey ten percent of all employees. The emphasis was on obtaining county-wide CQI baseline data, and the author suggested that the measures could be refined over time (e.g., Kaplan & Norton, 1996; Komaki, 1998; Malott & Garcia, 1987; St. Clair & Sharp, 1998). The rationale for surveying a sample was to increase response rate and to minimize response cost for the CQI team members working on the survey. In addition, the Steering Team was planning to

conduct this survey on a regular basis and was concerned that repeating the same survey on an annual basis with all employees may result in lowered return rates.

The stratified sample was selected by first creating three databases containing the names of all managerial, professional, and technical staff. The task force leader then selected three numbers from a random number table provided by the author (Dutka et al., 1982), one number for each employee database. Once the first survey respondent was selected based on that number, the task force leader selected every tenth name in each database as survey participant.

The author suggested to conduct this survey anonymously in a manner that would still allow for follow-ups with employees who failed to respond after the initial mailing by marking respondents' names off the mailing list (but not by having names on the completed survey form). Steering Team members were concerned, however, that staff would either not respond truthfully, or not respond at all, if employees perceived the remotest possibility that their responses could be traced back to them. As a consequence, the survey was administered anonymously. To facilitate a detailed response analysis per staff group, the task force used colored survey forms for each of the three employee classifications.

The task force team wrote a cover letter explaining the purpose of this survey and how the data were going to be used. Per the author's suggestion, the County Administrator co-signed the cover letter because the consulting literature indicates that support from senior management contributes to the success of performance improvement projects (e.g., Block, 2000; Braksick, 2000; Kaplan & Norton, 1996).

Cover letter and surveys were mailed in February 2000. A general follow-up mailing to all participants was mailed two weeks later, thanking those who already participated and prompting those who had not yet done so.

Results were analyzed and summarized by the CQI survey task force. The chair of the task force reported the results on April 20, 2000, to the CQI Steering Team and at April's monthly department head/elected official meeting. A CQI newsletter article with summarized results was published in June 2000.

Data Collection for Project 1. Measures of the author's consultation with the CQI Steering Team involved the performance criteria listed in Table 15. Most measures were process measures that indicated the degree to which the CQI Steering Team and the author were making progress toward the goal of implementing County CQI. Good performance on these measures was necessary to ensure that, in the long term, the County CQI initiative can be successful. Data consisted of archival records including CQI Steering Team meeting agendas and minutes, newsletter articles, and published reports.

Project 2: Internal Grant Review Process

At their March 1999 strategic planning retreat, the County Board of Commissioners identified top ten strategic goals for county government (Sumek, 1999). The Board formed strategic goal teams comprised of senior management and professional staff to recommend means for achieving these goals. The County Administrator asked the author to familiarize himself with the county's strategic plan

and to meet with each strategic goal team. The author met with several team leaders and attended a meeting by the Grant Evaluation Team. (The others teams either had not met at that time or had completed their charge.)

The purpose of the Grant Evaluation Team was to assess the feasibility of a county grant writer position, to streamline the County's internal grant review process, and to reduce the number of grant-related items on Board of Commissioners' meeting agendas. When the author attended his first session with the Grant Evaluation Team, the team had already decided against a grant writer position and had begun revising the internal grant review process.

Internal Grant Review Process. The County's internal grant review process in effect at that time (September 1999) required county departments applying for external grant funding to review the funding agency's requirements and to decide if they wanted to pursue that grant. If a department decided to pursue a grant for the first time ("original grant"), it forwarded a grant application for internal review to the Human Resources Director, the Corporation Counsel, the Finance Director, and, finally, to the County Board for approval. Following Board approval, departments sent the signed application to the funding agency. Upon receiving the grant contract, departments reviewed the contract for changes to the application and then completed a second internal review with the same steps as the application review process; it also ended with the County Board's acceptance of the contract. Grants scheduled for annual renewal ("renewal grants") underwent the same internal review for both applications and contracts; this included grants that were over twenty years old.

Consultation. While attending his first meeting with the Grant Evaluation Team on September 30, 1999, the author observed that team members in their effort to develop a new policy statement first, were, in fact, discussing process-related concerns. After this meeting, the author suggested to the team chair that the team develop a common understanding of the current process before revising the current policy. He offered to map both the current and the desired processes (e.g., Rummler & Brache, 1995). The team chair agreed, and the author and the team developed these process maps over a period of five months. At the county's March 2000 strategic planning sessions, the team used the completed process maps to communicate its recommendations to members of senior management and the Commissioners. On June 20, 2000, the County Board approved the team's new policy with an effective date of September 1, 2000. Thus, the revision of the policy and procedures was expected to have some impact on both original and renewal grant applications and contract reviews submitted to the Board after September 1, 2000. This effective date occurred almost six months after the new processes had been developed, and almost one year after the author's initial meeting with the team.

Consultation Outcome and Deliverables. The revised grant review procedure eliminates several steps from both the application and contract approval processes. Specifically, the new process (1) does not require an internal review by Human Resources and Corporation Counsel during the application stage, (2) enables the Board Chair to sign contracts that are unchanged from the application and thus eliminates the need to wait for a Board meeting (Board approval for this change is

still pending), and (3) eliminates more than two weeks review cycle time by obviating the entire internal review and Board approval for all renewal grant applications.

Deliverables consisted of process maps for original and renewal grants (e.g., Rummler & Brache, 1995), as well as, flow chart summaries (e.g., Bruno, 1995; Harbour, 1997). The new procedure manual, co-authored by the Finance Director and the author, consists of only five pages written in a job aid format. It includes an overview process map generated by the author (Appendix K). The author also developed a measurement system for tracking the performance of the new internal grant review process.

Data Collection. Table 17 shows the performance criteria for the author's consultation on the internal grants review process. Because no measurement system was in place to track the internal grant review process prior to the author's consultation, the author used archival data sources for all grant applications approved by the Board of Commissioners between January 4, 2000 and December 18, 2000. These sources included completed grant review forms, grant applications and contracts, and Board of Commissioners' agendas and minutes. Client ratings were obtained via the County's CQI project feedback form (similar to Appendix C but with CQI logo).

Project 3: Outbreak Investigation Process

While collaborating with the Human Services Department's (HSD) Epidemiologist on the Community Health Profile (see Appendix E, project 10), the

Table 17

Performance Criteria for Author's Consultation on the Internal Grant Review Process

Performance system	Performance model	Performance criteria	Performance improvement methods
Kalamazoo County (Performance)	Responsive and efficient processes	Average length of review process Number of grants on Board agenda	Install policies and procedures that support efficient processes
Grant Evaluation Team (Process)	Efficient and effective internal grant review procedures	Performance tracking in place before/now Number of process steps to complete review process	Revise current policy and procedures Commissioners adopt Grant Evaluation Team's recommendations
Consulting intern (Author) (Accomplish-ments)	Performance consulting	HPT tools incorporated in revised policy % positive client ratings	Apply human performance technology to support Grant Evaluation Team

author was asked to help improve the outbreak investigation process. Following a November 1999 outbreak investigation impeded by coordination and communication difficulties the Epidemiologist had decided to make improvements to the process but was not sure how to go about it (D. Rodgers, personal communication, December 7,

1999). He invited the author to work with him and the Outbreak Response Team. The Outbreak Response Team is responsible for investigating outbreaks of food- and water-borne illnesses within Kalamazoo County. The 15-member team consists of Environmental Health staff, Epidemiology staff, the Epidemiologist, Laboratory nurses, the Community Health Bureau director, and the county's Chief Medical Officer. The Epidemiologist coordinates this team.

Outbreak Investigation. An outbreak occurs when two or more unrelated persons from different households report becoming ill after eating at the same restaurant or drinking the same water (e.g., from a lake or well). Outbreaks may range in size from several people to several hundred (e.g., wedding receptions).

In most cases, the Human Services Department receives outbreak information from ill persons, their health care providers, area hospitals and emergency rooms, or the Michigan Department of Community Health (MDCH). After receiving this initial information, Epidemiology nurses interview persons who are ill and request stool specimens, and, if applicable, food samples. To establish a control group, nurses also call persons who attended the same event but do not show any of the symptoms. Environmental Health Specialists inspect the food establishment (and the event location in case of catered receptions) involved in the outbreak and collect food samples, if still available. They also interview restaurant staff and collect staff's stool specimens because staff may have been the carrier of the pathogen. Within 24 hours of determining the occurrence of an outbreak, the Outbreak Response Team meets for the first time to share all obtained information. At that meeting, the Chief Medical

Officer generates a tentative hypothesis about the causative agent based on reported symptomology and the consumed food's characteristics. The team subsequently meets to share additional information and to refine the hypothesis. During the early stages of the investigation process, the team may meet several times per week because the success of the investigation depends on quick coordinated team responding.

Once information on foods and symptomology are available, the Epidemiologist conducts statistical analyses on food types and symptomology to narrow the range of food items that may have transmitted the pathogen. After this analysis and the laboratory testing of stool and/or food samples are complete, team members make the final determination on the causative pathogen and the source of contamination. This information is important because the Human Services Department cannot assume that the provider of the food is the guilty party. For example, although a caterer's food may have transmitted the pathogen, the source of the contamination might be a soiled utensil at the event location, a guest who was already ill, or an infected event site staff who failed to follow proper hand-washing procedures. If it can be shown that an establishment was involved in contaminating the food, the team instructs Environmental Health Specialists to provide additional food safety training to restaurant staff or, possibly, shut down the establishment. In case of water-borne illnesses, such as the contamination of a public lake, HSD may temporarily close public beach access. Finally, the Epidemiologist writes an outbreak report and distributes it to the Director of the Health Department, MDCH, the

Michigan Department of Agriculture (MDA), and the Center for Disease Control (CDC).

A successful outbreak response process is a process that proceeds swiftly and accurately; in fact, time is the most critical component in understanding, and possibly preventing, a food- and water-borne outbreak. First, it is important that HSD staff receive information about potential outbreaks as soon as people get sick. Once people are no longer ill, HSD staff will not be able to collect stool samples. Second, it is important to obtain the complete menu to generate an accurate interview questionnaire that includes all food items. If food items are missing from the questionnaire, then the outbreak response team may not be able to link symptoms to certain food items that may have carried the pathogen. Third, if these questionnaires do not become available within one or two days, then people who meet the case definition may not be able to provide still-contaminated stool specimens. This makes it (almost) impossible to determine the causative pathogen and its source. Finally, if the outbreak response team cannot determine the pathogen and its source, HSD staff will not be able to educate the establishment operators on the specific procedures that caused the contamination. In the worst case, the team may not be able to determine which food establishment, if any, was involved. That means that restaurants or caterers may continue their unsanitary practices which can lead to future outbreaks.

A swift process is also in the interest of the team and HSD because the possibility exists that unsolved outbreaks receive more media attention than solved outbreaks. For example, the failure to identify the source of E. coli that contaminated

a public lake made front page headlines in a local newspaper (Krasean, 2000) and was subject of one of its editorials ("E. coli is a real danger," 2000).

Consultation. The author met with the Outbreak Response Team for the first time on January 19, 2000. At that meeting, he collected information on perceived areas of improvement and scheduled a follow-up meeting to discuss the findings. The team typically met four times per year. The author recommended to meet every two months at least until improvements have been implemented (monthly meetings were not acceptable to team members). Following this first meeting, the author categorized the team's responses according to the six cells of the behavior engineering model (Gilbert, 1996).

At the second meeting in March 2000, this time without the Epidemiologist (he left HSD employment in February), the author distributed the categorized improvement suggestions and asked team members to identify two priorities for each cell containing more than two items. The ensuing discussion indicated that the outbreak response process was not clear to all team members and, thus, the team could not prioritize performance improvement targets. The author suggested to process map the current process and formed a task force consisting of one Environmental Health Specialist, one Epidemiology Nurse, and one Lab Nurse to identify the current process. This process mapping was important because it provided the Outbreak Response Team, for the first time, with a detailed documentation of their current outbreak investigation process.

Consultation Outcome and Deliverables. The task force completed mapping the current process in May 2000. The entire Outbreak Response Team reviewed this map and approved it with minor changes. Before the task force had the opportunity to discuss possible process improvement steps, a food-borne outbreak occurred; although a performance measurement system had not been in place at that time, the author used this opportunity to ask staff to write down the dates when critical investigation steps occurred. The author used these anecdotal data to assimilate a time line description of the outbreak response process for each staff group, to finalize a map of critical process steps, and to develop an outbreak response tracking and debriefing form with data from this and a previous outbreak. On July 19, 2000, the author presented these documents to the Outbreak Response Team. The team adopted these deliverables; minor changes were made to the process map and the tracking and debriefing form. At the same meeting, the team and the author developed an implementation schedule and decided to use it during the next outbreak. Following this meeting, the county's Chief Medical Officer reported using the anecdotal data collected during the outbreak to support his writing of the final outbreak investigation report. The first draft of another deliverable, a field guide containing critical information and documents identified through the process mapping, had been reviewed by the team in December 2000. It is expected to be completed by February 2001 and piloted tested shortly thereafter.

Data Collection. Table 18 shows the performance criteria for the author's consultation on the outbreak investigation process. The author reviewed eleven

reports from previous outbreaks. Client ratings were obtained using the County CQI meeting feedback form (similar to Appendix C).

Table 18

Performance Criteria for Author's Consultation on the Outbreak Investigation Process

Performance system	Performance models	Performance criteria	Performance improvement methods
Kalamazoo County (Performance)	Protect citizens from food- and water-borne illnesses	Cycle time to identify cause of illness and source of pathogen	Prevent future outbreaks from same source
Human Services Department (Process)	Timely response to outbreaks of food-borne or water-borne illnesses	Performance tracking in place before/now Time to develop hypothesis Time to obtain laboratory results	Timely and relevant information for quick decision-making All critical skills available during investigation Performance feedback
Consulting intern (Author) (Accomplish-ments)	Performance consulting	HPT tools incorporated in outbreak response documents % positive client ratings	Apply human performance technology to support Outbreak Response Team

Cross-Project Consulting Dimensions

This section addresses performance consulting dimensions that cut across the author's various projects. They include (1) relationship building, (2) project lineage, (3) transfer of technology, and (4) data collection and performance measurement systems. These performance consulting dimensions reflect necessary accomplishments for supporting the author's performance consulting efforts at the process and the performance levels.

Relationship Building. The author's impact as consultant depended to a large degree on his clients' influence in county government (i.e., management versus front line staff). The impact also depended on the type and the size of audiences attending presentations and receiving CQI reports. Working with influential decision makers enabled the author to increase the opportunities for performance improvement projects. Therefore, the author collected and presented data on the development of a relationship network, such as numbers of professional contacts with county staff, number and number and types of teams consulted with, and client feedback.

Project Lineage. Although the County Administrator assigned many projects to the author, some were requested by other staff who cooperated with the author on previous projects; the author, too, initiated some projects. The author tracked his projects' lineage to illustrate project sources and the impact of relationship building.

Transfer of Technology. As noted in the design of the progressive consultative internship system, consulting interns may be able to transfer human performance technology to the sponsoring organization. Throughout his internship

the author documented his use of human performance technology tools and their application by county staff.

Data Collection and Performance Measurement Systems. Although some departments in Kalamazoo County Government tracked their outputs (e.g., clients served per year; grant dollars obtained), many departments did not have a data collection or performance measurement system in place. The author collected information on those data collection and performance measurement systems that he developed and installed during his internship.

Evaluation Standards

The evaluation of the quality of the consulting outcomes involved both merit (quality) and worth (value) (e.g., Scriven, 1993). An object or program has merit when it is a good exemplar of its class (e.g., a training program that meets all criteria); it has worth when it achieves value relative to its purpose (e.g., trainees learned skills they can use on their job). This distinction is important because merit becomes irrelevant when a program does not meet client expectations and goals (R. O. Brinkerhoff, lecture notes, January 19, 1999).

To stay with the example of a training program, consider an instructional designer who designs and delivers state-of-the art classroom instruction (merit). The value for the client lies in the fact that trainees learn applicable skills at a certain cost (worth). If senior management decides to abandon classroom training in favor of computer-based performance support systems, then classroom training loses its worth

to the organization. In this case, the merit (quality) of the instructional designer has not changed; what has changed is the worth of classroom instruction in light of more cost-efficient methods. The purpose of this section is to develop internal and external standards for judging the author's consulting with respect to its merit and worth.

Merit: Internal Standards. Internal standards for judging the quality of the author's internship should ideally be based on standards that currently exist for the field of human performance technology. However, the field does not have a universal set of standards other than the fact that the success of performance interventions should be reflected in measurable performance improvement. Stolovitch and Keeps (1999b) note that "a consensus on [HPT's] critical attributes appears to have formed" (p. 9, emphasis added). They suggest that HPT "rejects the acceptance of apparent causes and solutions without an examination of other facets of the system . . . [and] enthusiastic, unsubstantiated interventions that cannot demonstrate firm theoretical foundations or valid performance results" (p. 9). They conclude that HPT practitioners use interventions "based on analysis of data, scientific knowledge, and documented precedents" (p. 10).

It is suggested, therefore, to base standards for judging the quality of his performance consulting internship primarily on direct evidence of performance improvement (e.g., reduction in process steps or cycle time). Because not all projects were completed during the author's internship and because not all projects targeted performance improvement, it is further suggested that evaluation standards take into account evidence of steps taken toward future performance improvement, including

strategic planning, transfer of human performance technology, and establishing performance measurement systems.

Worth: External Standards. External standards on the worth of successful consulting often include repeat business and client satisfaction (e.g., Bly, 1998; Weiss, 1998). These standards also apply to the author's consulting internship because both repeat business and client satisfaction are important indicators for value of internal consultants to their internal clients (Lovelace, 1982; Steele, 1982).

In order to evaluate if the data collected from the present case study support the assumption that human performance interns can effectively consult in county government, the author proposes the standards listed in Table 19. These standards and conclusions drawn from the evidence provided in chapter V are applicable only to evaluating the author's own non-PCIS consultative internship. They may provide, however, a first test of this assumption based on the present case study.

Performance gaps (Table 19, external standards) can be considered meaningful when their performance deficits either require a large amount of the county's resources and or may affect the safety of county staff or Kalamazoo County citizens. Progress toward closing these gaps would have a marked effect on the cost, quality, and timeliness of services provided by the county and citizens' quality of life. For example, one of the author's projects involved both safety and financial concerns. The Kalamazoo County Sheriff frequently declared a state of emergency because jail population exceeded state norms (e.g., Channing, 1999b). This overcrowding necessitated early releases which eroded the public's trust in the local criminal justice

system due to a fear of crimes committed by released inmates (e.g., Nash, 2000). In addition, jail overcrowding was expensive, requiring frequent overtime pay for officers and staff.

Table 19

Internal and External Standards for Judging the Quality of the Author's Consulting

Internal standards (merit of consulting)	External standards (worth to client)
Did the author apply HPT tools with a proven track record? Did the author demonstrate transfer of human performance technology? If no performance measurement system was in place, did the author install such a system? Did the author collect baseline and follow-up data? Did the author demonstrate performance improvement?	Did the author receive consulting requests or referrals? Were requests frequent enough to require prioritizing of projects? Did requests address meaningful performance gaps? What type of feedback did the author receive from his clients?

Data Analysis

The primary means of data analysis consisted of visually inspecting data graphs and tables. Statistical description of the data, such as standard deviation, were not required. Data graphing and analysis were conducted with the Microsoft® Excel spreadsheet program.

In summary, Evaluation I used data from the author's internship as Kalamazoo County's Continuous Quality Improvement Coordinator to assess the assumption that HPT internships can provide effective performance consulting for the interning county organization. The author collected performance, process, and accomplishment data for a number of projects and data on four different consulting dimensions. The next section of this chapter describes Evaluation II: the evaluation of the progressive consultative internship system design's utility and feasibility.

Evaluation II: Assessing the Utility and Feasibility of the Design of the Progressive Consultative Internship System

This component of the two-tiered evaluation approach assessed the quality of the design of the progressive consultative internship system with respect to its utility and feasibility. A second purpose was to determine possible areas for improving the design prior to future development and implementation. This section describes (1) evaluation questions and criteria, (2) evaluation method, (3) evaluation standards, and (4) data collection and analysis procedures.

Evaluation Questions and Criteria

The purpose of this section is to present a rationale for the questions to be answered in Evaluation II. It outlines evaluation questions, evaluation criteria, and evaluation categories.

Evaluation Questions

The evaluation focused on two main questions. First, is the proposed internship system useful? and second, can that system be feasible?

Utility. Utility was defined as the "condition or quality of being useful" and as "usefulness" (Morris, 1985, p. 1331). Only if the question of utility can be answered in the affirmative will further development and implementation be justified.

Feasibility. Feasible was defined as "capable of being accomplished or brought about; possible" and as "capable of being utilized or dealt with successfully" (Morris, 1985, p. 494). The answer to this question was of interest for the present project because utility does not imply feasibility. Thus, Evaluation II attempted to assess whether the proposed internship system is perceived as useful and possible.

Evaluation Categories

Worthen points out that it is essential to have a "manageable number of categories in organizing potential questions and communicating them to others" (Worthen et al., 1997, p. 256). The categorical framework for developing evaluation statements for the evaluation instrument was based on the program theory described in chapter III (see Figure 3). From the program theory flowed five categories for organizing a set of relevant evaluation statements: purpose, assumptions, goals, benefits, and methods.

The first four categories addressed the first evaluation question regarding the utility of the design. That is, the internship system's design would only then have

utility if its stated purpose, assumptions, goals, and benefits seemed valuable to the evaluators. The methods category connected to the second evaluation question. Evaluators rated statements with respect to the feasibility of the processes and tools for planning, selection and recruitment, implementation, and evaluation. These five overall categories guided the development of the evaluation instrument (Appendix L). The design described specific goals, benefits, and tools for each of the three user groups; this specificity was maintained in the evaluation instruments without compromising the five major evaluation categories.

Evaluation Method

No research or formal guidelines exist for selecting the perfect evaluation method for a specific evaluation purpose. Evaluators can select from a number of approaches that approach which, in their opinion, best fits their particular evaluation purpose. The present evaluation was based on the expertise-oriented evaluation method selected from six major evaluation approaches described by Worthen and his colleagues (1997). Table 20 lists these approaches and their respective purposes.

Expertise-Oriented Evaluation Method

The purpose of the expertise-oriented evaluation method best aligns with the purpose of the present evaluation because of its focus on judging the quality of an evaluation object; in this case, the design specifications for an internship system. It is considered the most widely used approach to evaluation (Worthen et al., 1997). This

method depends primarily upon the expertise of the evaluator to judge the value of the evaluation object. Examples of this approach include peer reviews of journal manuscripts, site visits of educational programs, and dissertation committees. Table 21 summarizes the critical features of the expertise-oriented evaluation method. The limitations will be discussed in chapter VI.

Table 20

Major Program Evaluation Methods and Their Purposes
(based on Worthen et al., 1997)

Evaluation approach	Purpose
Adversary-oriented	Balanced examination of all sides of controversial issues, highlighting the program's strengths and weaknesses.
Consumer-oriented	Provides information about products to aid decisions about purchases or adoptions.
Expertise-oriented	Providing judgments of quality.
Management-oriented	Providing information to aid in decision-making during all stages of program development.
Objective-oriented	Determine the extent to which objectives are achieved.
Participant-oriented	Understanding and portraying the complexities of a programmatic activity, responding to an audience's requirement for information.

Table 21

Features of the Expertise-Based Evaluation Method
(based on Worthen et al., 1997)

Feature	Description
Distinguishing characteristic	Judgments based on individual knowledge and experience
Criteria for judging evaluations	Use of recognized standards Qualifications of experts
Benefits	Broad coverage of evaluation objects (e.g., peer reviews, evaluation of training programs) Efficiency and ease of implementation (e.g., evaluation material can be sent to evaluators, evaluation can occur over a period of time, low cost) Capitalizes on human judgment
Limitations	Replicability Personal bias Open to conflict of interest Superficial look at context Overuse of intuition

Worthen and his colleagues (1997) identify four types of review systems that exemplify the expertise-oriented evaluation method. These systems are the formal

professional review system (e.g., accreditation panels), the informal professional review system (e.g., tenure reviews, dissertation committees), ad hoc panel reviews (e.g., peer review panels or blue-ribbon panels), and ad hoc individual reviews (e.g., consultant review of programs) (Worthen et al., 1997).

"Usually one person will not own all of the requisite knowledge needed to do the evaluation adequately. A team of experts who complement each other are much more likely to produce a sound evaluation" (Worthen et al. 1997, p. 120). The present evaluation was based on this team approach, called an "ad hoc panel review." An ad hoc panel review is a "one-shot evaluation" (Worthen et al., 1997, p. 126) that is prompted by a particular time-specific need for evaluative information. Members of an ad hoc review panel may or may not communicate with each other. For example, members of a site visitation team communicate with each other while reviewers of a journal manuscript conduct their reviews without contacting other reviewers. The evaluation of the PCIS design falls within the ad-hoc panel category because it was a one-time evaluation of a system design, conducted by a set of independent experts.

Selection of Experts for Evaluating the PCIS Design

Rossi recommended that evaluators of a program include its staff and stakeholders (Rossi et al., 1999). Stakeholders for the proposed design may include potential users of the progressive consultative internship system. Table 22 describes the requirements that were developed to select individuals with expertise relevant to

Evaluation II. Potential evaluators in the sponsor and faculty advisor categories were required to have experience in two areas relevant to the PCIS.

Table 22

Selection Requirements for Expert Evaluators

User	Function	Area of expertise
Sponsor	High-ranking official in county government (e.g., county administrator or department head)	Understanding of the functioning of county government Experience with implementing quality or performance improvement
Faculty advisor	Faculty or adjunct faculty of a Midwestern university	Teaches graduate coursework in I/O psychology, human performance technology (HPT), or organizational behavior management (OBM) Expertise in HPT theory and practice Experience with interns in the area of performance improvement
Intern	Advanced graduate students	Graduate training in I/O psychology, HPT, or OBM Completed most requirements for master's or doctoral degree

Following project approval by Human Subjects Institutional Review Board (HSIRB) (Appendix M), the author invited two representatives from each user group for a total of six reviewers. He knew each individual professionally through his

graduate work and his internship. Their functions and areas of expertise were as follows.

Sponsor Evaluators. The author invited the county administrator of a county located in central Michigan to participate in this evaluation. The county administrator had several years of experience with implementing a successful county-wide performance improvement plan.

The author also invited the department head of a large department of a county in southwest Michigan. The department head had been applying performance improvement principles and tools within his department for several years. His department also utilized interns.

Faculty Evaluators. The author invited a member of the faculty of the Psychology Department at a large Midwestern university. The faculty member had experience with applying HPT technology and with supervising graduate students in large organizations. (Note that the complete term is "faculty advisor evaluator." However, the shorter term "faculty evaluator" was used for reading convenience.)

The author invited an adjunct faculty member of the Psychology Department at a large Midwestern university to serve as second faculty evaluator. The adjunct faculty directed an international professional association and maintained a successful consulting business. This faculty member frequently used graduate students to work in both association and consulting business.

Intern Evaluators. The author asked the faculty of the Psychology Department at a large Midwestern university to suggest advanced doctoral students who had

completed most requirements for their degree. Because faculty suggested a total of eight doctoral students, the author used a random-selection procedure to select two students. He wrote each student's name on a piece of paper, folded the paper, and asked another graduate student to randomly draw two names. He then contacted the selected students, explained the evaluation procedure to them, and asked them if they were willing to participate in the evaluation using a script required and approved by the Human Subjects Institutional Review Board (Appendix N). Both students agreed to participate.

The author had worked with one student on a teaching assignment in 1997 and attended one class with the other student in the first part of 2000. The author had not had any other professional or personal contact with these two intern evaluators.

Participant Compensation. The author did not pay the experts. Instead, as a sign of appreciation, he provided each evaluator with a $20 gift certificate for a national bookstore.

Evaluation Standards

An evaluation is only then complete when standards for judging the outcome of the evaluation are clearly specified (Worthen et al., 1997). Setting the standards for Evaluation II raised again the issue of who the evaluator was. In the present case, the author was conducting the evaluation, and, therefore, by definition was the evaluator. Because it was not appropriate for the author to evaluate and judge the quality of his own design, he asked expert judges to evaluate the design and provide a

summative judgment about its quality. This summative judgment took the form of a rating along the three dimensions excellent, adequate, and not adequate. They were operationalized as follows. (1) Excellent: I can recommend implementation without changes, (2) adequate: I can recommend implementation with minor changes as indicated by my comments, and (3) not adequate: I cannot recommend implementation without major revisions.

Data Collection and Analysis

This section describes the design document and evaluation checklist used by the evaluators for rating the quality of the design of the progressive consultative internship system. It outlines the evaluation procedure and the method for maintaining confidentiality of data. It also describes the data analysis methods.

Design Document

A specific design document based on chapter III functioned as the design specifications used by evaluators (Appendix O). It describes the internship system's users, all aspects of the program theory, and the system's processes and tools.

Evaluation Checklist

One appropriate tool for evaluating the design of instructional systems and programs is the evaluation checklist (Brinkerhoff, 1987). This checklist may consist of subjective statements, ratings, or objectives reporting the value of the design along

specific criteria, standards, or other expectations that the design should meet or address. The checklist format was particularly appropriate for the present evaluation because this project did not permit experimental evaluation of the internship system; it provided a subjective approach to evaluating the program's design. Evaluators represented prospective users; their answers to evaluation statements were largely a matter of professional expert judgment (Brinkerhoff, 1987). Thus, the evaluation checklist was selected because its qualitative nature provided a good fit for the expertise-based ad hoc review panel evaluation approach utilized in the present study.

The evaluation checklists (Appendix L) asked evaluators to indicate if they agreed or disagreed with specific evaluation statements. Evaluators also had the option to indicate if they could not respond to a statement, or to not respond at all. The three evaluation checklists included a total of 99 checklist items in ten categories: (1) purpose, (2), assumptions, (3) goals, (4), benefits, (5) methods, processes, and tools, (6) planning, (7) selection and recruitment, (8) learning and consulting support, (9) evaluation, and (10) tools overall. Categories 1 through 9 reflect the design logic described in chapter III and in the design specifications reviewed by the evaluators (Appendix O).

Evaluators were asked to evaluate each item along the dimensions agree, disagree, and can't answer. The checklist for sponsor evaluators included 37 evaluation items, for faculty evaluators 32 items, and for intern evaluators 30 items. The checklist provided space below each statement for optional comments on the design's strengths and weaknesses with respect to specific evaluation statements.

Evaluators were invited to add tools and criteria that in their judgment were left off the evaluation checklists; they were also invited to add optional overall comments. The last section of the checklist asked for an overall evaluation based on the three aforementioned standards for summative judgment.

Evaluation Procedure

Following HSIRB project approval (Appendix M), the author asked the evaluators if they were willing to participate in the evaluation project. All evaluators agreed, and the author provided them with an evaluation packet approved by the HSIRB. This packet consisted of a cover letter (Appendix P), the HSIRB-approved consent form (Appendix Q), the design specifications (Appendix N), the evaluation checklist (Appendix O), a $20 gift certificate, and a stamped envelope with the author's return address. The packets were distributed between December 14 and December 20, 2000.

After distributing the evaluation packets the author contacted each evaluator in person or per telephone to ascertain if evaluators had questions on issues that were unclear to them. Because of the upcoming Christmas and New Year's Day holidays, the evaluator's indicated different time schedules for conducting the evaluations; the author's follow-up telephone calls occurred between December 28, 2000 and January 9, 2001. None of the evaluators indicated that they had any questions. The author received the completed evaluation checklists and signed and dated consent forms

between January 2 and January 18, 2001. After receiving completed checklists, the author thanked each evaluator in person, over the telephone, or via e-mail.

Confidentiality of Data

The author protected the confidentiality of evaluators' responses by assigning each evaluator a code based on their user category. Evaluators from the sponsor category received codes S-1 and S-2. Evaluators from the faculty advisor category received codes F-1 and F-2, while the graduate students who responded in the intern category received codes I-1 and I-2. A master list with the names and contact information of all participating evaluators was the only means of linking the evaluators names to the checklist code. Upon receipt of the completed evaluation instruments, the author coded each checklist in the upper right corner and made a check mark next to the evaluator's name on the master list. After the data were analyzed, the author destroyed the master list. The consent document (Appendix Q) explained this procedure to the participants. The completed coded questionnaires will be kept for three years in a locked file cabinet in the primary investigator's office.

Adequacy of Data Collection Techniques

Worthen and his colleagues (Worthen et al., 1997) provide several criteria for reviewing the adequacy of evaluation data collection techniques. Table 23 uses these criteria in the form of a checklist to review the adequacy of the data collection

method used for Evaluation II. Based on Table 23, the author suggests that the data collection method was adequate.

Table 23

Checklist for Reviewing Adequacy of Evaluation II Data Collection Techniques

Data collection categories	Were Evaluation II data collection techniques adequate?
Did the information to be collected provide a comprehensive picture of what was evaluated?	Yes
Were the information-collection procedures legal and ethical?	Yes
Would the cost of any data-collection procedure be worthwhile, given the amount and kind of information it provided?	Yes
Could the information be collected without undue disruption to the project?	Yes
Could the procedures be carried out within the time constraints of the evaluation?	Yes
Was the information collected reliable and valid for the purposes of the evaluation?	Acceptable
Did the data-collection plan make use of already existing data where appropriate data were available?	Did not apply

Summary. Evaluation II assessed the quality of the design of the progressive consultative internship system. The purpose of this evaluation was to determine the utility and feasibility of the design, to detect strengths and weaknesses, and to recommend improvements. Evaluation criteria were based on internship and consulting literatures. Evaluation categories were based on the program's theory developed in chapter III. The expertise-based evaluation method involved an ad hoc review panel consisting of two experts from each of the three user groups: sponsor, faculty advisor, and intern. Evaluators received evaluation packets that included HSIRB-approved consent forms, design specifications, and evaluation checklists. Evaluators responded to evaluation statements and rated the overall quality of the design.

Chapter Summary

This chapter described the two-tiered approach to evaluating the design of the progressive consultative internship system. The purpose of Evaluation I was to provide evidence relevant to the assumption underlying the PCIS design, namely that HPT interns at county government can effectively consult in their interning organization. Evaluation II assessed the quality of the design of the progressive consultative internship system with respect to its utility and feasibility. The evaluation was conducted by evaluators from each of the three user categories. The next chapter provides the results for Evaluations I and II.

CHAPTER V

RESULTS

This chapter presents the results of the two evaluations of the design of the progressive consultative internship system. The results section for Evaluation I (testing the assumption that HTP interns can consult effectively in a county government organization) contains data for projects described in the previous chapter as well as data for five additional projects. Results for these projects are accompanied by project outlines. The results section for Evaluation II (assessing the utility and feasibility of the design of the progressive consultative internship system) reports the six evaluators' summative evaluation of the overall design and their ratings of the design's components.

Results of Evaluation I: Testing the Assumption that HPT Interns Can Consult Effectively in a County Government Organization

This section maintains the same order of projects as the previous chapter. First, individual data are provided for Project 1: county-wide continuous quality improvement (County CQI), Project 2: internal grant review process, and Project 3: outbreak investigation process. These results are followed by data for the following additional projects listed in Appendix E: consultation with the Parks Department, consultation with the Circuit Court Friend of the Court phone staff, evaluation of the

Seven Habits of Highly Effective People workshops, Committee of the Whole meeting length, and the Kalamazoo criminal justice system process mapping project. Each of these additional projects is briefly described to provide a context for the project's data. These projects were included because they illustrate aspects of the author's consulting that were not captured by projects 1 through 3. Evaluation I results conclude with cross-project consulting dimensions, namely, relationship building, project lineage, transfer of technology, and data collection and performance measurement systems.

Project 1: County-Wide Continuous Quality Improvement (County CQI)

This section presents data collected on the following CQI projects: Team meeting attendance, CQI strategy: development and communication, dissemination of County CQI, the CQI survey, and the CQI grant program. This reflects the approximate timeline of the author's work with the CQI Steering Team. The categorization of some measures as performance or process measures occurred with respect to short-term individual County CQI projects. For example, the audience's rating of rollout presentations is a performance measure while attendance at these presentations is a process measure. Long-term performance measures of the impact of the county CQI on the county's performance will have to be collected over time. The CQI survey is the CQI Steering Team's first (qualitative) approximation of a baseline measure. Table 24 presents a summary of results for performance, process, and accomplishment measures based on deliverables and criteria outlined in Table 15.

Table 24

Summary of Results for Project 1: County-Wide Continuous Quality Improvement

Project component	Performance measures	Process measures	Accomplishment measures
CQI team education		Average team attendance at 33 meetings = 73.9% Seven departments applied for and received CQI grants totaling $16,3000	Systems thinking in report to Commissioners; one of six County CQI principles Behavior engineering model basis for CQI strategy, CQI grants, CQI self-study, CQI inventory of expertise
CQI strategy	CQI mission and goals accepted by 100% of senior management	CQI survey return rate = 76.6%	Behavior engineering model basis for CQI strategy
Dissemination of County CQI: Reports		Monthly reports to department heads and elected officials Two reports and presentations to Commissioners	

Table 24—Continued

Project component	Performance measures	Process measures	Accomplishment measures
Dissemination of County CQI: Presentations	Overall rating of presentation = 3.3 (on scale of 1 to 4)	Attended by 54.4% of all county staff (n = 536)	
Dissemination of County CQI: Newsletter articles	68% of CQI survey respondents find articles "interesting" (per CQI survey)	21 articles authored by 13 different team members	

Team Meeting Attendance

The CQI Steering Team met once per month from June 1999 through August 1999, and semi-monthly beginning in September 1999. The author's role was to prepare and facilitate meetings, work with the rotating facilitators and recorders, write and distribute minutes, and execute the team's decision. Next to the author's sponsor, the County Administrator, the CQI Steering Team was the author's primary client. The author tracked attendance (i.e., a process measure) at these meetings in order to recognize trends in participation. Figure 14 shows the attendance during the author's internship period for business meetings (top) and education meetings (bottom). Low attendance between June and August 2000 coincided with summer vacation and the replacement of three team members. Several of the new team members joined with

the understanding that they had to honor prior time commitments and thus would not be able to attend all scheduled meetings. None of the meetings had to be canceled due to low projected (i.e., per RSVP) or actual attendance. Overall, the average attendance for 18 business meetings was 76% (10.4 members) and for 15 education meetings, 72%, (10.2 members). The overall average attendance per meeting of 73.9% was sufficient to develop a continuous quality improvement strategy for the entire organization.

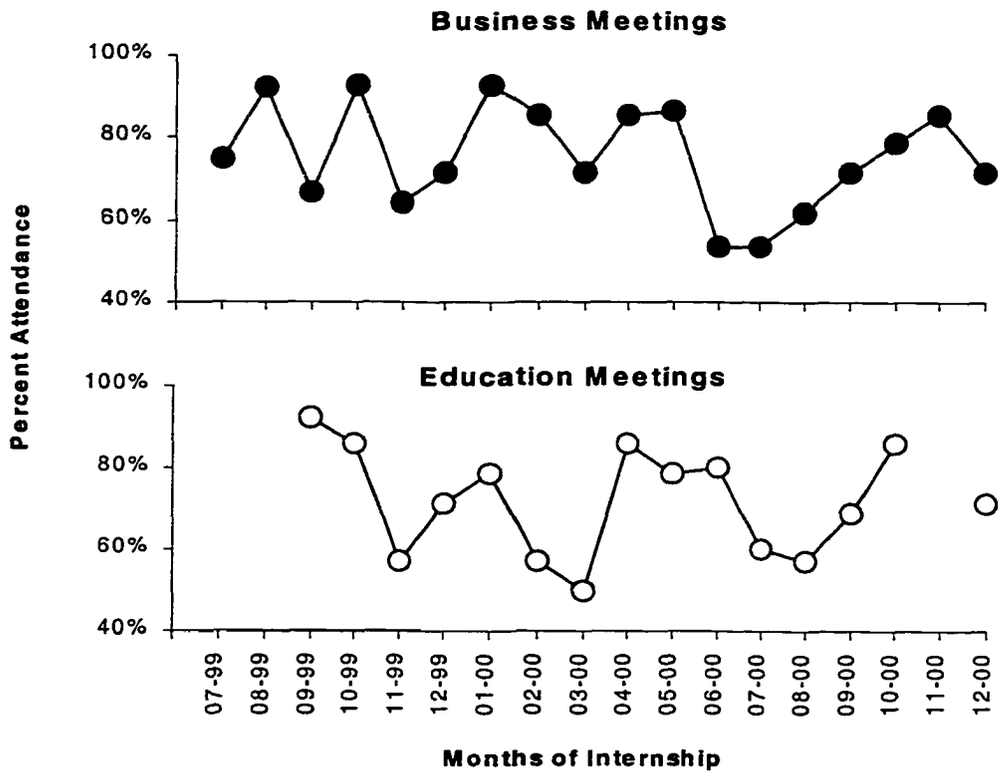

Figure 14. CQI Steering Team Attendance From July 1999 Through December 2000.

The November 2000 education meeting was skipped to give team members time to prepare for and conduct the CQI rollout.

CQI Strategy: Development and Communication

Results for the development and communication of the CQI strategy involves results from three behavior engineering model (BEM) exercises and the results from a survey among the county's senior management staff. The behavior engineering model became the foundation for the CQI strategic goals.

CQI Strategy: BEM Exercise. During the first application of the BEM exercise, the author diverged from Dean's approach (Dean, 1997b) in that he had each CQI Steering Team member place two sticky notes on the marker board's six cells. The author, who had not conducted this exercise before, did so because he expected that using one response option per team member may not suffice because only nine team members were in attendance. The author's second application of the exercise occurred at a department head/elected officials meeting, also in December of 1999 (n=24). The final application of the exercise occurred in January 2000 with staff from the Parks Department (n=12). Figure 15 shows the results of each of the BEM exercises. Overall, 87% of all responses fell within the cells representing the organizational system, namely information, resources, and incentives.

All three audiences for which the author conducted this exercise expressed interest in learning how their results compared to private sector results. The author provided all participants with a graph similar to Figure 16 showing a comparison of the total results from Kalamazoo County Government and those reported by Dean (1997b) for business and industry. All three groups expressed surprise that their results did not differ substantially from private sector responses.

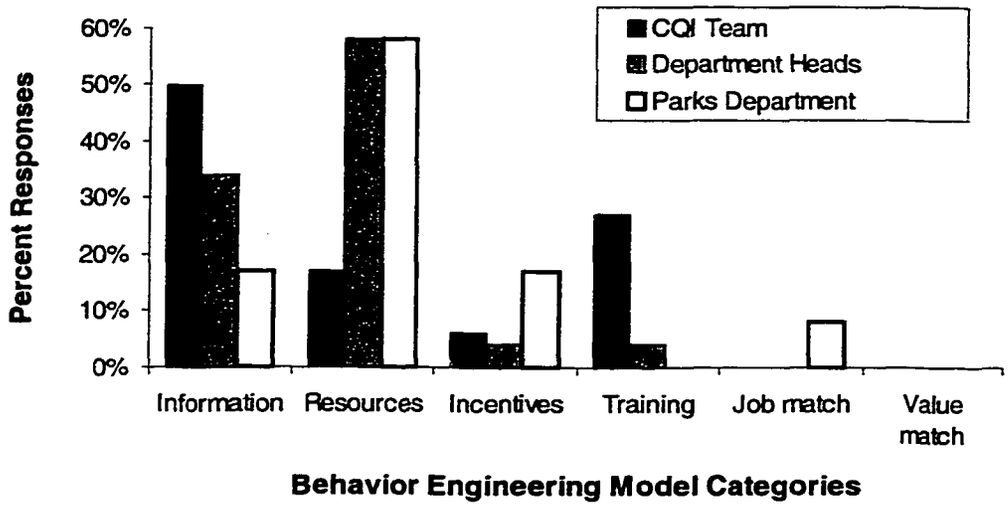

Figure 15. Results from the Behavior Engineering Model Exercise Conducted by the Author with Three Different Staff Groups.

Note: The n for the CQI team reflects two responses per person.

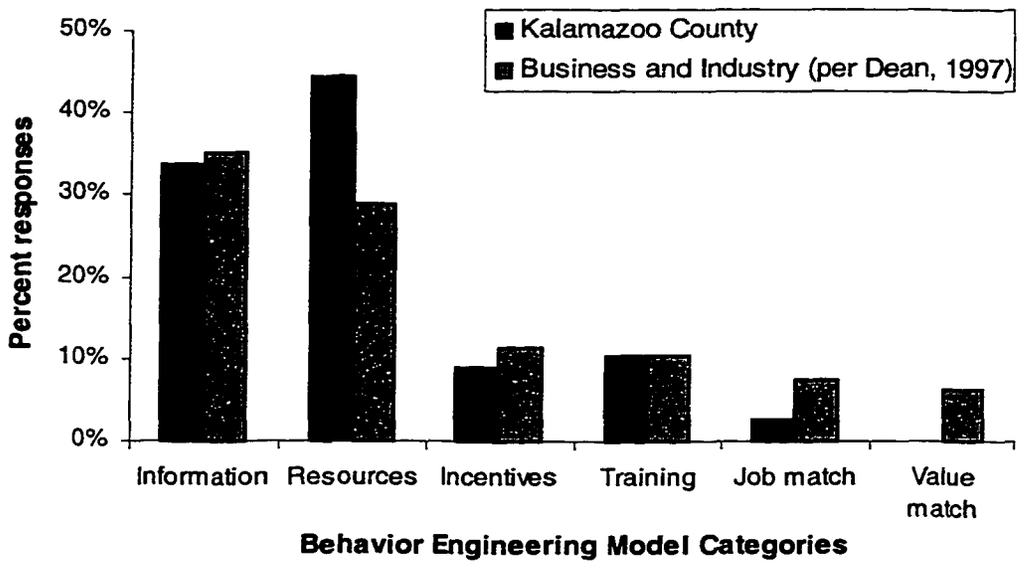

Figure 16. Comparison of Results from the Behavior Engineering Model Exercise Obtained by the Author for Kalamazoo County Government and as Reported for Business and Industry.

CQI Strategy: Senior Management Buy-In. Figure 17 shows the summary result of the anonymous survey conducted at the county's two strategic planning sessions in March 2000 for the item "The role of County CQI in implementing the county mission and goals and improving service quality is . . ."

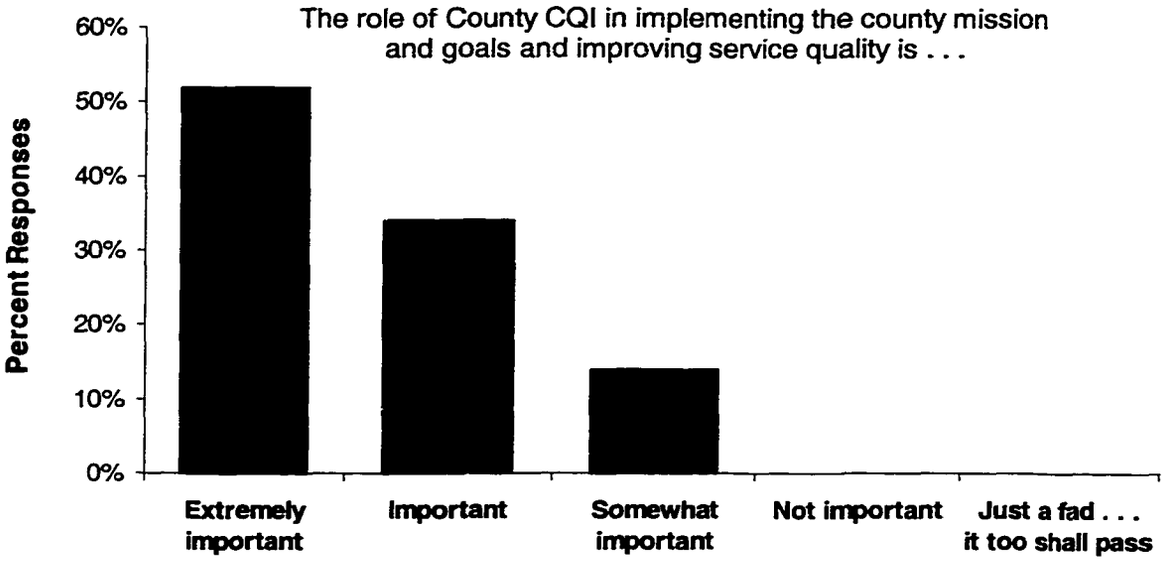

Figure 17. Summary Results of Anonymous Survey Conducted at Kalamazoo County's March 2000 Strategic Planning Sessions.

Strategic session 1, conducted on March 3, 2000, consisted of appointed and elected department heads (n = 32); strategic session 2, conducted on March 15, 2000, consisted of Board of Commissioners and management staff (n = 18) (Liss, Probyn, & Vandenberg, 2000, p. 41). 100% of the county's senior management viewed county CQI as important for implementing the mission and goals for entire county organization and for improving service quality.

Dissemination of County CQI

The author and the CQI Steering Team used different channels to communicate the county's continuous quality improvement initiative to all county employees. The major channels were oral and written reports, presentations, and articles in the county's monthly newsletter.

Oral and Written Reports. The County Administrator invited the author to attend monthly meetings of the county's department heads and elected officials (DH/EO). The author attended his first DH/EO meeting in July 1999. Beginning with the September 1999 meeting, the DH/EO meeting agenda included the item "Continuous Quality Improvement Update (Peter Dams)." Since that meeting, the author provided information about CQI and the CQI Steering Team to department heads and elected officials. For the June 2000 meeting, the author asked the Human Resources (HR) department's receptionist to report results from the CQI survey since she had chaired the survey task force. She reported the survey findings and distributed data graphs that highlighted the survey results. The author attended a total of 16 monthly DH/EO meetings; CQI updates were provided at 15 meetings.

Written reports consisted of two CQI updates to the Board of Commissioners in January and October 2000; both reports were accompanied by presentations from the CQI Steering Team. The January 2000 update was the first written communication to the Board about specific projects undertaken by the CQI Steering Team. The October 2000 update officially kicked-off the county-wide CQI rollout.

Individual Presentations. The author gave his first presentation about CQI to the Board of Commissioners on January 4, 2000. The presentation was prepared by the author and presented by the County Administrator, two CQI Steering Team members, and the author. The same month, the author made a similar presentation to members of the Parks Department. In April 2000, the County Administrator and the author co-presented an updated version of the January presentations to staff at the Circuit Court's Juvenile Home during two different shifts. In August 2000, the County Administrator presented the material to staff of the Head Start program.

Rollout Presentations. A second presentation to the Board of Commissioners was held by two team members in October 2000. This presentation was the first in what the CQI Steering Team called the "CQI rollout." The computer-based CQI rollout presentation was prepared by the author and reviewed and edited by all team members. Its purpose was to introduce the majority of county staff (i.e., the goal was 75%) to CQI and to provide an overview of the resources developed by the CQI Steering Team, such as the CQI grants, the CQI self-study, the inventory of expertise.

Team members paired up to prepare, schedule, and conduct the CQI rollout presentations (i.e., a 15 minute slide presentation with 15 minutes scheduled for questions). The author coordinated this rollout but did not participate in the presentation due to his obligation to deliver another project (i.e., the Kalamazoo Criminal Justice System process mapping, see below). Attendees were asked to sign-in and to give written feedback using a feedback form developed by the CQI Steering Team (Appendix R). Attendees also received a brochure developed by the author and

finalized by the CQI Steering Team. This brochure explained CQI and its benefits, summarized the CQI strategic mission and goals, and provided examples of CQI projects (Appendix S).

Figure 18 shows the cumulative number of county employees and county commissioners attending one or more CQI presentations. A total of 178 staff and commissioners attended presentations between January 2000 and September 2000. A total of 536 staff (54.4%) attended 28 rollout presentations (i.e., process measures). The latter number most accurately reflects the total number of different members of

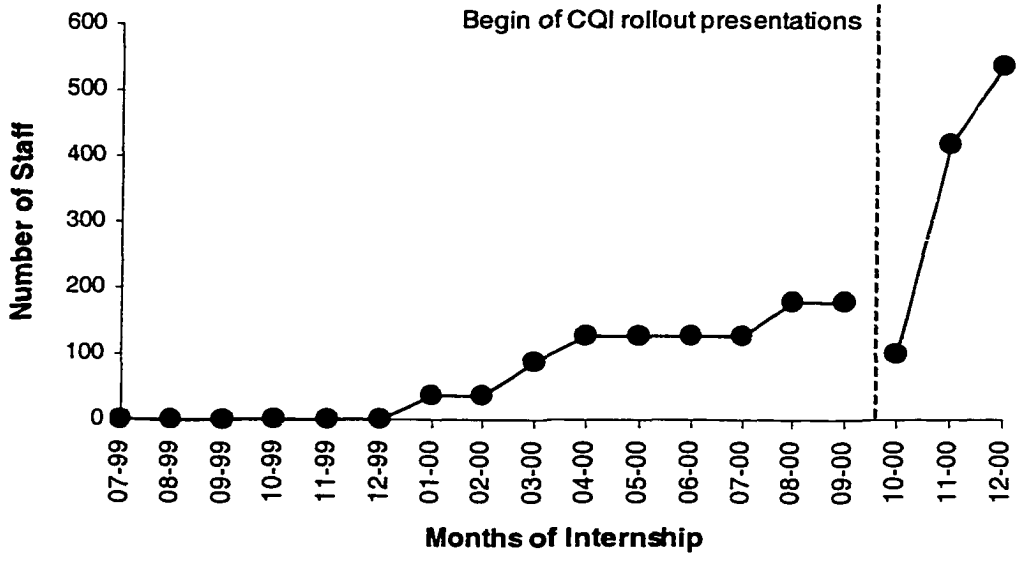

Figure 18. Cumulative Number of County Employees and Commissioners Attending CQI Presentations Before and During the CQI Rollout.

the county organization attending a CQI presentations because the majority staff who attended presentations between January and September also attended the rollout presentations, with the exception of the Parks Department staff. Additional CQI

rollout presentations for the Human Services Department (HSD) and the Adult Probation (Department of Correction) were planned for the early part 2001.

Sixty-two percent of the audience (n = 333) completed feedback forms (Appendix R). Figure 19 shows the results of the audience ratings of the CQI rollout presentations (i.e., performance measure). The CQI presentations received an overall

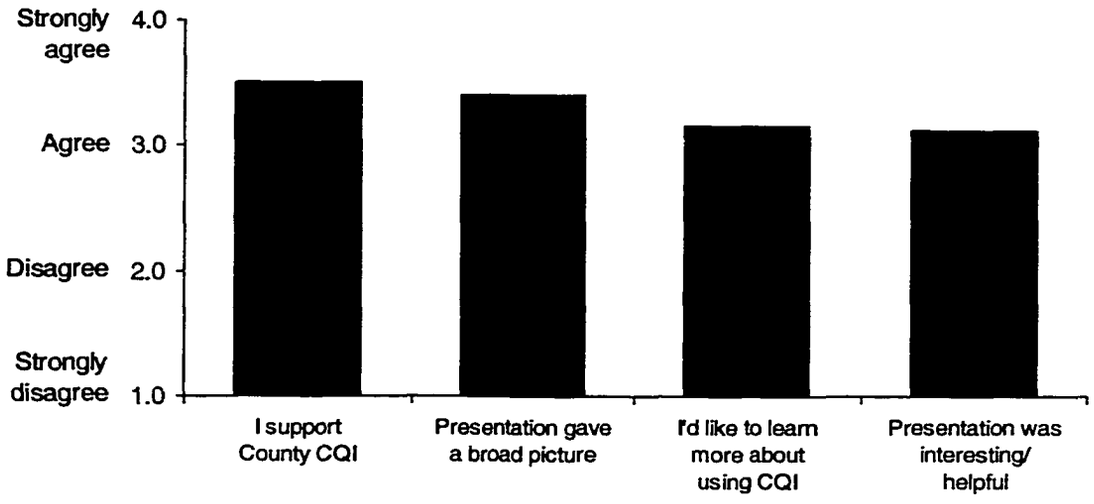

Figure 19. Audience Feedback Ratings of CQI Rollout Presentation in Response to Four Evaluation Statements.

rating of 3.3 on a scale of 1.0 ("strongly disagree") to 4.0 ("strongly agree"). Audience members were also asked to indicate whether or not their department had been using some CQI ideas; 76% indicated "yes" and 14% indicated "no;" 10% of returned feedback forms did not show any indication. The author shared this information with the CQI Steering Team and used it for a summary graph for the December 2000 newsletter article describing the rollout and its reception by staff.

The author relied for his data collection and graphing on both individual feedback forms and summarized feedback forms provided by three team members

and one support staff. The author conducted one agreement check for each of the four data collectors by comparing the totals on the summary sheets to totals he calculated using the respective individual feedback forms. Agreement data were computed by dividing the number of agreements by the number of total responses summarized. Agreement was 100% in three cases involving 84, 75, and 50 total responses each; agreement was 87.5% in one case involving 80 responses.

With respect to audience type, the sign-in sheets showed that staff from all categories (i.e., managerial, professional, and technical), as well as, elected officials and the Commissioners, attended the CQI rollout presentations. One unexpected but welcomed audience was the Circuit Court judges. They invited a member of the CQI Steering Team to give this presentation at their December strategic planning retreat.

Newsletter Articles. The third channel of communicating CQI to county employees consisted of a regular column in the County Connection, Kalamazoo County's employee newsletter. The author submitted the first CQI article to the newsletter editor one month after beginning his internship; it was printed in the September 1999 issue of County Connection. This article was the first in a continuing series of CQI articles about quality and performance improvement. The newsletter editor created a special section for these articles called "Quality Corner." Following the two initial articles by the author, he continued to review and edit articles by CQI Steering Team written members; revisions typically involved providing more detail with respect to the CQI process described. Based on the first two revisions, the author designed a job aid to assist Steering Team members in

writing about successful applications of CQI (Appendix T). Appendix U lists the titles and authors of all CQI newsletter articles written by the author and other members of the CQI Steering Team between September 1999 and December 2000.

Figure 20 shows the cumulative number of different team members who authored one or more articles for the newsletter. The first two articles (September

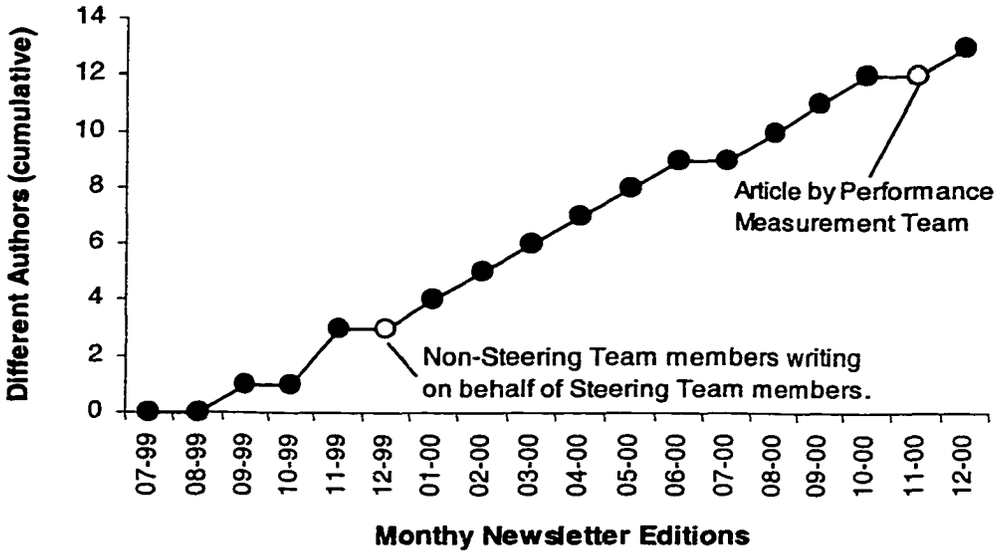

Figure 20. Number of Different CQI Steering Team Members Authoring One or More Articles for the County's Newsletter.

and October 1999) were written by the author. For each of the subsequent editions of the County Connection, with the exception of December 1999, July 2000, and November 2000, different team members authored or co-authored at least one article. By December 2000, 13 different team members (including the author) had contributed a total of 21 articles to the Quality Corner.

CQI Survey

This section reports data from the CQI survey project. It reports the survey results and their relation to the behavior engineering model and the return rate compared to other county surveys.

Survey Results. Figure 21 shows the survey results from the first annual county-wide CQI survey per BEM categories (Appendix J) based on the answer options always and frequently. A summary of this graph was printed in the June 2000 newsletter article by the chair of the CQI survey task force; that article also described the survey categories and referred to Gilbert's Human Competence (Gilbert, 1996). A byproduct of the survey was that for the first time the newsletter editor had some information on the size of the newsletter's readership: 85% of the respondents indicated that they read the County Connection. The 2001 survey will include additional questions about employees' use of the information presented in CQI-related articles.

Return Rate. Figure 22 shows the return rate of the CQI survey compared to other employee surveys. Seventy-two of 94 surveyed employees returned completed survey instruments for a return rate of 76.6% (i.e., process measure). Until then, the highest county survey return rate (66%) was achieved by the county's retirement survey asking staff about their desired retirement options. (The other survey project the author was involved in, the Seven Habits survey, will be described below.)

The CQI Steering Team used this survey to collect baseline of staff's perception of the then current state of continuous quality improvement in Kalamazoo

County Government. Future applications of this survey will be used to draw inferences about the county's perceived impact of CQI dissemination and implementation efforts.

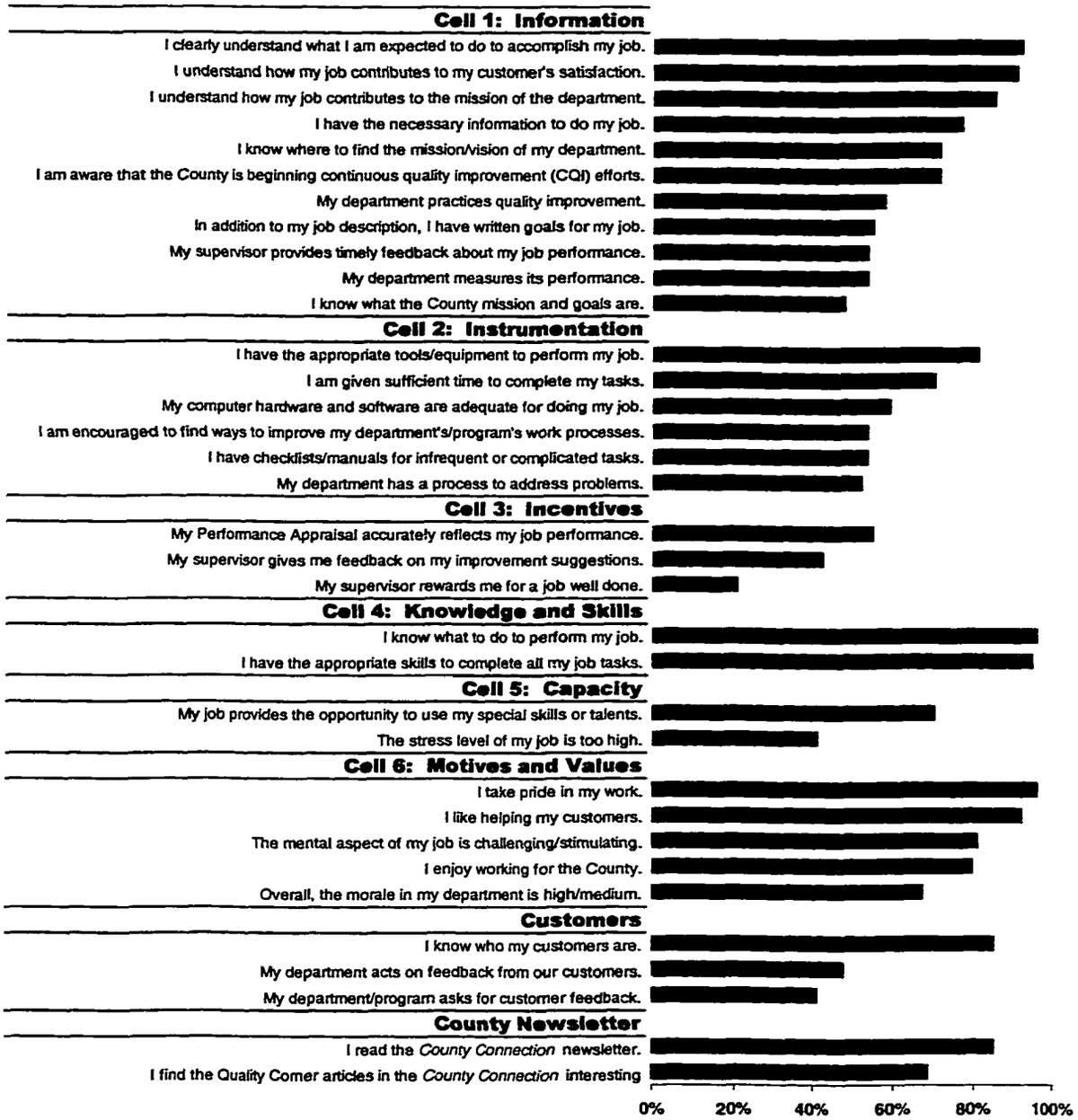

Figure 21. CQI Survey Results per BEM Categories.

Cell 1 through 6 refer to the behavior engineering model.

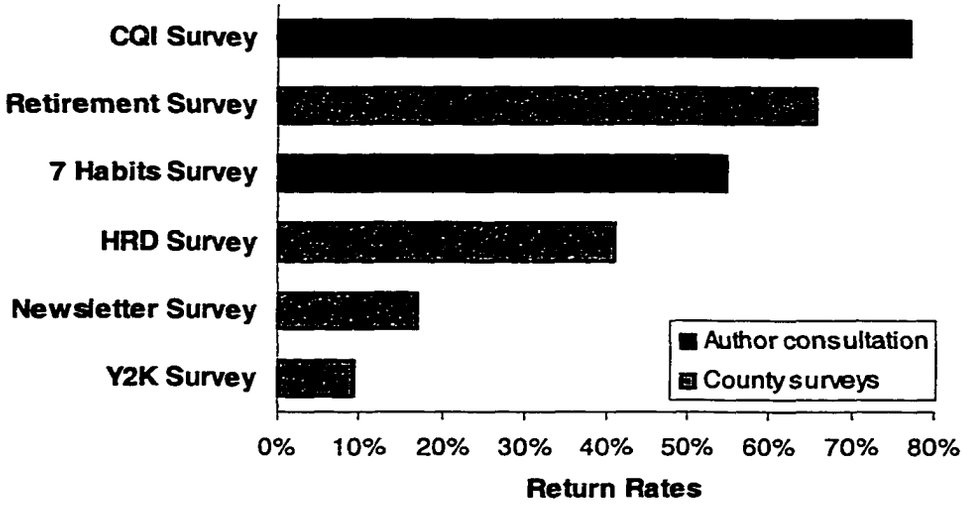

Figure 22. Return Rates of Kalamazoo County Employee Surveys.

The black bars represent surveys conducted with the author's consultation, the striped bars represent surveys conducted by county staff.

CQI Grant Program

As a response to a CQI Steering Team member's request for CQI funds to support her department's strategic planning effort, the CQI Steering Team developed its county-wide CQI grant program. This program provides up to $2,500 to any county department that can show how the funds will be used for measurable progress toward achieving any of the five BEM-based CQI goals. A second requirement for the grant program is that receiving departments report back to the CQI Steering Team how the impact of the grant-funded project on the department's performance was assessed. The application packet included the application form, a final impact report outline, and, as a reference, the County CQI mission and goals (Appendix V).

Table 25 shows that the CQI Steering Team received eight CQI grant requests during 2000. Each of the approved grant requests had been issued by a different department.

Table 25

CQI Grant Applications

Grant	Agency: Amount	Approved
Individual development plan for managers	MSU Extension: $6,000	Not approved
Update and validate the current strategic plan	MSU Extension: $2,000	February 17, 2000
Staff recognition lunch	HSD: $1,800	September 21, 2000
Heaters for park ranger's workshops	Parks Department: $2,500	September 21, 2000
Microsoft Excel® for process mapping	Circuit Court: $2,500	November 16, 2000
Update and validate current strategic plan	Office of Prosecuting Attorney: $2,500	November 16, 2000
Microsoft Word® for document exchange	Sheriff: $2,500	December 21, 2000
Gap analysis for Airport's environmental management system	Airport: $2,500	December 21, 2000

The CQI grant program was designed to have two benefits. First, to enable departments to conduct projects related to continuous quality improvement, and second, to provide members of the CQI Steering Team with an additional education tool. The education component consists of awardees' reports to the team following conclusion of the project. Not all projects will be likely to have the same educational value, but the airport's gap analysis, for example, may well serve as a practical application of conducting and using gap analyses.

Although the results for the following projects are reported separately from the county-wide continuous quality improvement initiative, they were made possible only because of the County Administrator's CQI initiative. Thus, they align with the author's main assignments and job description: to champion County CQI within and outside county government and to facilitate departmental performance improvement.

Project 2: Internal Grant Review Process

The presentation of the data on the author's consultation on the internal grant review process follows the layout of Table 17. Results will be reported for performance measures, process measures, and accomplishment measures, in that order. Table 26 provides a summary of results for these measures.

Kalamazoo County: Responsive and Efficient Processes

The performance criteria for the new policies and procedures were (1) average length of internal review process and (2) the number of grant-related agenda items for

Board of Commissioners meetings. This section reports the results for these performance measures.

Table 26

Summary of Results for Project 2: Internal Grant Review Process

Performance measures	Process measures	Accomplishment measures
Estimated reduction in of review process by 15.9 days Projected reduction of agenda items on grant-applications by 40 to 45%	Implemented performance measurement system Overall number of process steps reduced by 24%	Process map incorporated in revised grant review policy Clients considered consulting value-adding (n = 3; 50%)

Average Length of Internal Review Process. This measure combines the review times for original and renewal applications and contracts but excludes the time used by funding agencies to return the contract; that process is not under county staff's control. Figure 23 shows the duration of application reviews and contract reviews for a total of 19 grants applied for and received during 2000. Ten grants were applied for under the old review policy (before September 1, 2000) and nine grants were applied for under the new review policy. Application review lengths under the old review process ranged from 11 to 21 days (mean = 15.4 days) and from 7 to 29 days (mean = 16.4 days) under the new review process. Contract review lengths under the old review process ranged from 6 to 70 days (mean = 20.5 days);

under the new review policy only one grant contract (# 11) was reviewed (21 days). Grants 12 through 19 did not undergo a separate contract approval. The total internal review time ranges from 21 to 91 days under the old review process (mean = 35.9 days) and from 7 to 51 days (mean = 18.9 days) under the new review process.

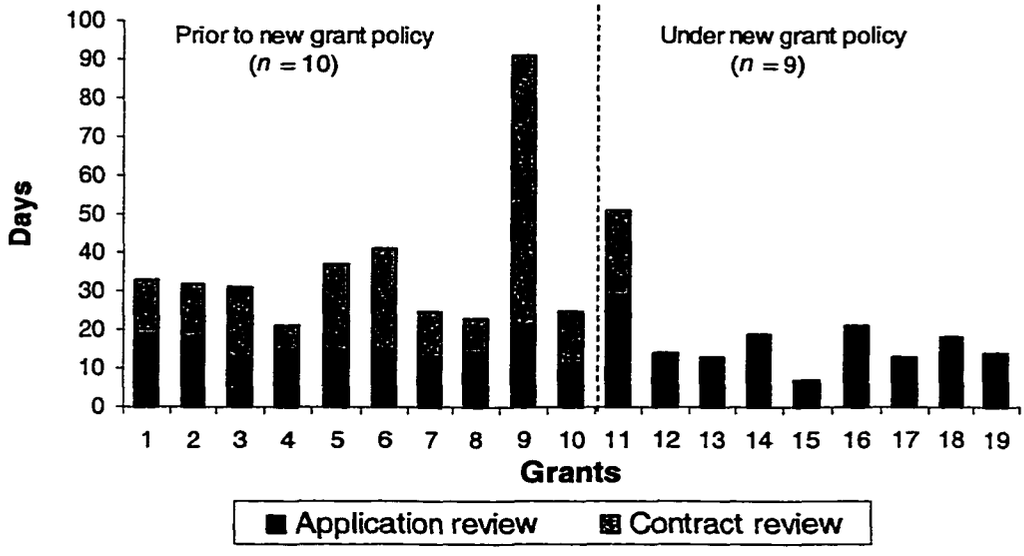

Figure 23. Duration of Application Review, Contract Review, and Total Review Process.

Grants 12 through 19 were hybrid grants combining application and contract approval into one process.

The reason grants 11 through 19 did not undergo a contract review was that the Board Office which prepares all applications and contracts for Board review combined the request for approval of the grant application with a request for subsequent acceptance of the future contract. This was necessitated by the legal requirement that all contracts (grants and otherwise) must be attached to the Board minutes of the meeting at which approval was obtained. The new grant policy had short-circuited this requirement because it allowed the Board Chair to sign contracts

that were received unchanged from the application; this step, however, circumvented the Board approval and, inadvertently, eliminated the opportunity for minutes stating contract approval. To accommodate the new review policy, Board Office staff had planned to file grant contracts with the minutes stating approval of the hybrid request items, a major effort requiring additional filing and grant tracking not previously necessary.

This deviation from the planned policy was noticed by the author during his data collection. He communicated his findings to the chair and members of the Grant Evaluation Team on December 20, 2000 and suggested that the team meet with Board Office and Corporation Counsel to revise the new policy to accommodate legal requirements. This meeting occurred on January 11, 2001.

At that meeting the Grant Evaluation Team eliminated the dual review process for original grant contracts with change (Board approval) and without change (no Board approval). Now, the policy requires Board approval of all original grant contracts. Thus, this aspect of the internal grant review process was changed back to its former status. The team upheld the policy that renewal grant applications do not require Board approval, but that all renewal contracts do. Therefore, the major impact of the new grant review policy on the internal grant review process will occur with future renewal grants: Average review time for those grants is expected to be reduced by approximately 15.9 days; this is the average length of application reviews for all grants shown in Figure 23.

Number of Grant Agenda Items on Board Agendas: Applications. One of the purposes for the team's evaluation of the .internal grant review process besides "streamlining" it was to reduce the number of non-policy items ("clutter") on the Board's agendas (Kalamazoo County Board of Commissioners, May 16, 2000a, p. 3). The new grant review policy did not require renewal grants to be approved by the Board until the final contract was obtained and reviewed. Thus, a sharp decline in renewal grant applications was expected. Figure 24 shows that following the September 1, 2000 effective date of the new policy four renewal grant applications were brought before the Board, namely two in September, and one each in October and November. Two original grant applications were brought before the Board in September and none during the remainder of the year.

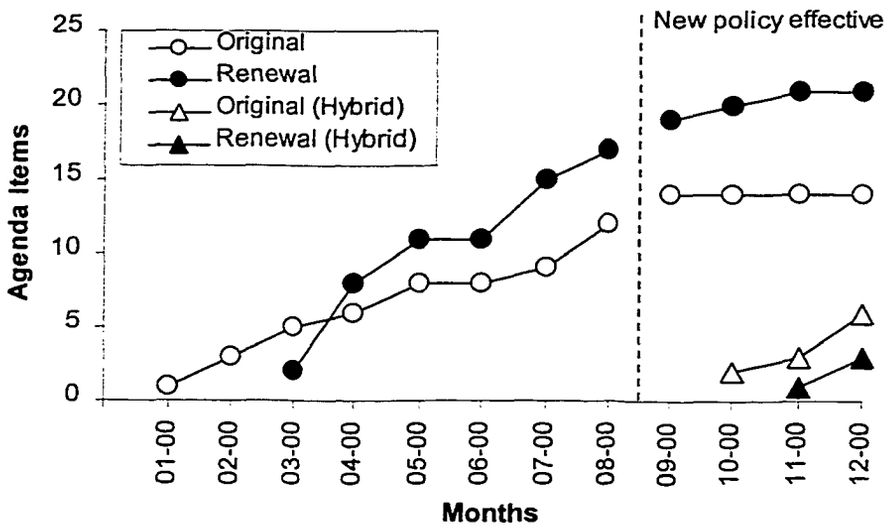

Figure 24. Cumulative Number of Grant Application Agenda Items Before the Board of Commissioners During 2000.

Hybrids were grant-related agenda items that combined Board approval of grant application and (future) grant contract, if awarded.

Figure 24 shows further the occurrence of the aforementioned hybrid grant agenda items requesting simultaneous Board approval for both grant application and grant contract. Six of these hybrid grant agenda items involved original grants and three involved renewal grants. Per the January 11, 2001 updated review policy, these hybrid grant requests are not expected to recur as the Board Office begins to enforce the new policy and return renewal grant applications to the requesting department.

Board agendas in 2000 included a total of 42 grant applications evenly divided among original and renewal grants; in 1999, the Board reviewed 15 applications for original grants (54%), and 13 applications for renewal grants (46%). The new review policy does not require review of renewal grant applications; however, some funding agencies require Board approval of renewal grant applications which will prevent the complete elimination of the renewal grant application review process. Based on 1999 and 2000 grant application data, it is expected that agenda items on all grant applications will be reduced by 40 to 45%.

Number of Grant Agenda Items on Board Agendas: Contracts. Figure 25 shows that a total of 75 grant contracts were placed on the 2000 Board agendas for commissioner approval. Eighteen grant contracts were approved in September because many departments attempted to have a signed contract on file prior to the beginning of the county's new tax year, October 1. After the new grant review policy became effective on September 1, 2000 the number of grant contract agenda items did not change. This is not expected to change in the future since the updated review policy requires Board approval of all original and renewal grants contracts. The

author will continue to track performance of the internal grant process and periodically report his findings to the Grant Evaluation Team.

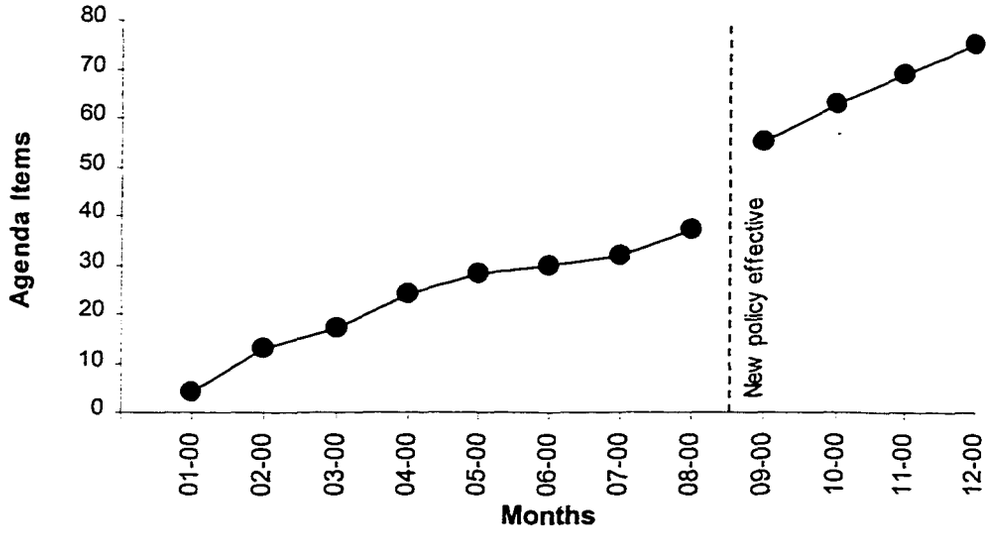

Figure 25. Cumulative Number of Grant Contract Agenda Items Before the Board of Commissioners During 2000.

Grant Evaluation Team: Efficient and Effective Internal Grant Review Procedures

The performance criteria for the revised grant review policy were performance tracking in place before and after the author's consulting and the number of process steps to complete the review process. This section reports the results for these process measures.

Performance Tracking in Place. In order to provide data on the new grant review process, the author installed a performance tracking system reviewed and approved by the Grant Evaluation Team (Appendix W). Prior to the tracking form, the county did not have a means to efficiently monitor the internal grant review process.

The date categories on this tracking form correspond to departmental and administrative sign-off dates required on a new grant review form. Board approval dates can be obtained from grant applications and contracts. Thus, the new tracking form does not require additional data collection by the county's grant administrator and the grant administrator at the Human Services Department (HSD tracks and administers its own grants).

Number of Process Steps to Complete the Review Process. Figure 26 shows the number of process steps of the internal grant review process for original and renewal grants before and after the author's collaboration with the Grant Evaluation Team (see Appendix X for complete list of process steps). For original grants, the

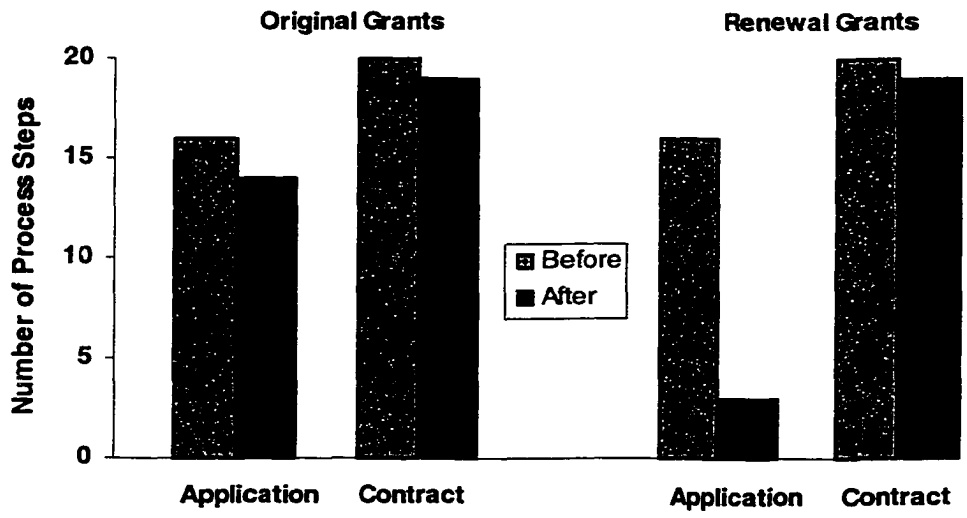

Figure 26. Number of Process Steps of the Internal Grant Review Process for Original and Renewal Grants Before and After Author's Collaboration with the Grant Evaluation Team.

number of process steps for the grant application was reduced from 16 to 14 steps (13%), and the number for contract review steps was reduced from 20 to 19 steps

(5%). The review process for renewal grant application was virtually eliminated from 16 to 3 steps (81%); the three remaining steps involve only departmental review and mailing of the application form. One step (5%) was eliminated from the contract review process for renewal grants. Overall, the number of process steps for original grants was reduced by 8% and for renewal grants by 39%, a total reduction of 24%.

The elimination of most of the steps of the renewal grant application review process saves review time otherwise spent on paperwork by the department, administration, the Board office, and the Commissioners. In addition, departments applying for continuation of an existing grant no longer have to wait over two weeks for Board approval to submit grant applications to the funding agency.

Consulting Intern: Performance Consulting

The performance criteria for the author's consulting with the Grant Evaluation Team were HPT tools incorporated in the county's revised grant review policy and client ratings. This section reports the results for these accomplishment measures.

HPT Tools Incorporated in the County's Revised Grant Review Policy. The revised grant review policy includes a summary graph of the new review processes for both original and renewal grants (Appendix K). This summary process map is based on detailed process maps and flow charts presented to the Board of Commissioners during the March 2000 strategic planning session and a Committee of the Whole meeting.

The grant administrator of the Human Services Department has begun to use the author's grant tracking form (Appendix W) in October 2000. The County's grant administrator began using the tracking form following the January 11, 2001 policy review.

Client Ratings. Following the June 2000 Board approval of the new grant policy, the author distributed six project completion feedback forms (similar to Appendix C) to the Grant Evaluation Team as part of the evaluation component of the county's continuous quality improvement initiative. Three forms (50%) were returned to the author. Figure 27 shows that all responding team members agreed that the author's consulting added value and improved efficiency and quality. Two team

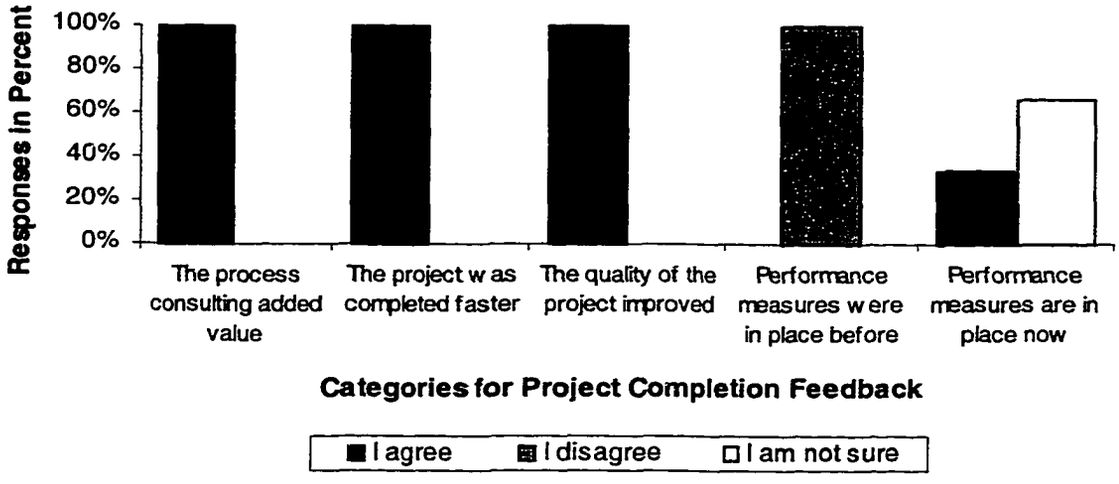

Figure 27. Client Ratings of Author's Consulting Contributions to the Grant Evaluation Team.

members indicated that they were not sure whether performance measures were in place. (At that time, the author had recommended performance measures based on the signature blocks of the internal review form but had not yet developed the

tracking form. Thus, the distribution of the project completion form may have occurred prematurely.)

The returned feedback forms contained the following additional comments to the question "What could I do to make my consulting more valuable in the future?" (1) "maybe some basic review for those not familiar with process mapping," (2) "these two [performance measures in place before/after] are confusing—not sure how to answer," and (3) "Peter, I thought the process mapping was very important in 'streamlining' the process. I appreciate your knowledge and skill in CQI."

Project 3: Outbreak Investigation Process

The presentation of the data on the author's consultation on the outbreak investigation process follows the layout of Table 18. Results will be reported for performance measures, process measures, and accomplishment measures, in that order. Table 27 provides a summary of results for these measures.

Kalamazoo County: Protect Citizens from Food-and Waterborne Illnesses

The performance criterion for the outbreak investigation process was the cycle time to identify the cause of illness (i.e., pathogen) and the source of the pathogen. However, a review of eleven reports on investigations of outbreaks that occurred between January 1996 and August 2000 made available to the author did not provide sufficient data to generate a baseline for this performance measure.

Table 27

Summary of Results for Project 3: Outbreak Investigation Process

Performance measures	Process measures	Accomplishment measures
Baseline: 34 days to identify cause of illness and source of pathogen	Implemented performance measurement system Baseline: 6.3 days to develop first hypothesis on possible pathogens	Developed new field guide Clients considered first two meetings value-adding (n = 10; 77%)

Figure 28 lists the titles of the eleven outbreak reports obtained by the author and the data obtained from them with respect to the performance criteria listed at the top of the three data columns. Only the two most recent reports (18%), both on outbreak investigations conducted after the Outbreak Response Team completed the process mapping, provided specific dates of pathogen identification with an average of 34 days; four reports indicated that the pathogen was identified (36%), and five reports did not report a positive pathogen identification (46%). Six reports indicated that the mode of transmission (e.g., cream in a cake, coffee) could be identified, but no specific date was given as to when this identification occurred (55%). Five reports indicated that the mode of transmission could not be ascertained (46%). Five outbreak investigation reports identified the pathogen and the source or mode of transmission (46%). A more stable baseline will emerge over time as the Outbreak

Report Title	Working hypothesis developed	Pathogen (i.e., cause) identified (1)	Source or mode of transmission identified
Robert Morris Park - August 2000 *(water-borne: swimming lake)*	12	20	O
Food-borne Disease Outbreak, Kalamazoo County - June 2000	3	48	O
Pine West Food borne Illness Investigation Report [November 1999]	4	X	O
Food-borne Disease Outbreak, Kalamazoo County - June 1998 (Revised October 1998)	O	O	X
Food-borne Disease Outbreak, Kalamazoo County - July 1997	?	X	X
Food-borne Disease Outbreak, Kalamazoo County - April 1997	O	X	X
Food-borne Disease Outbreak, Kalamazoo County - January 1997	?	O	O
Shigella Outbreak in a Daycare Setting, Kalamazoo County - November 1996	X	O	O
Unexplained Disease Outbreak, Kalamazoo County - June 1996	?	X	X
No formal report (wedding reception)	?	X	X
Food-borne Disease Outbreak, Kalamazoo County - January 1996	O	O	O

Legend:

20	Days between outbreak and event
O	Event occurred, no date available
X	Event did not occur
?	Event occurrence cannot be determined

(1): Same as lab results obtained

Figure 28. Baseline Data from Outbreak Investigation Reports between January 1996 and August 2000.

Response Team uses a newly developed tracking form to record process data on future outbreak investigations (Appendix Y).

Human Services Department (HSD): Timely Response to Outbreaks of Food- and Waterborne Illnesses

The performance criteria for timely response to outbreaks by the Outbreak Response Team were (1) performance tracking in place before the author's consulting and now, (2) the time to develop a first hypothesis on possible pathogens, and (3) the time to obtain stool specimens and food samples analysis results. This section reports the results for these process measures.

Performance Tracking in Place. In order to provide data on the Outbreak Response Team's performance, the author developed a performance tracking system that focuses on the completion dates of specific "milestones" in the investigation process (Appendix Y). This system was developed based on the process map developed by the author and the Outbreak Response Team. Future data will be collected by members of the Outbreak Response Team. The form will also be used as a checklist to make sure that the Outbreak Response Team follows all investigation steps, to write the outbreak investigation report, and to assess the team's performance following the newly established debriefing meeting at the conclusion of future outbreaks.

Time to Develop First Hypothesis on Possible Pathogens. The first data column in Figure 28 shows the elapsed number of days between the day of the outbreak and the day the Outbreak Response Team developed a first hypothesis on

possible pathogens. Based on the three most recent reports, the average is 6.3 days; most likely an inflated figure. Of the remaining eight reports, three report the hypothesis but not the date and for four reports it cannot be ascertained whether a hypothesis was developed. One report indicated that a hypothesis was not developed by the team; this was due to the fact that it was a surveillance-based outbreak for which the pathogen was known before the extent of the infected population was assessed.

Time to Obtain Stool Specimens and Food Samples Analysis Results. While developing the milestones tracking form with representatives from the Outbreak Response Team, the author learned that receiving the lab results is equivalent to identifying the pathogen. Thus, this performance criterion is the same as the performance criterion "cycle time to identify the cause of illness (i.e., pathogen)" reported above.

Consulting Intern: Performance Consulting

The performance criteria for the author's performance consulting with the Outbreak Response Team were HPT tools incorporated in Outbreak Response Team documents and client ratings. This section reports the results for these accomplishment measures

HPT Tools Incorporated in the Outbreak Response Team Documents. The author supported the Outbreak Response Team in developing an outbreak investigation field guide which will be used as a reference manual that provides field

staff with critical information; the team's existing comprehensive reference manual was considered too bulky and too cumbersome for quickly finding relevant information. The field guide consists of the milestones form for tracking the completion dates of critical outbreak investigation steps (Appendix Y) and process map outlining the most critical steps in the investigation process ("milestones"). Other material provided by Outbreak Response Team members included of list with critical skills and their backups (a first), a contact list with complete contact information of team members and the HSD director (a first), a specimen collection job aid designed by the author based on information provided by the team, legal procedures for dealing with non-compliant establishments (a first with respect to having written support documentation), a client statement form, and a confidentiality form for HSD staff. The detailed process map drawn up prior to developing the field guide will be included in the reference manual.

Client Ratings. After his second meeting with the Outbreak Response Team on March 9, 2000, at which the author used the behavior engineering model to summarize performance improvement ideas and developed the process mapping task force, the author distributed the CQI meeting feedback form (similar to Appendix C) to all 13 team members present. The author conducted this evaluation as a regular evaluation component of the county's continuous quality improvement initiative. A total of ten forms were returned to the author (77%). Figure 29 shows that all respondents indicated that the meeting added value.

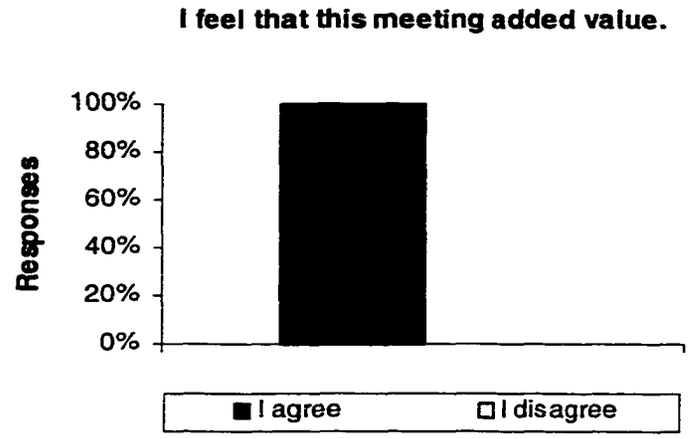

Figure 29. Client Ratings of Author's Initial Contributions to the Outbreak Response Team.

Table 28 lists the write-in answers for the evaluation items "This meeting added value because:" and "What could I do to make these meetings more valuable in the future?" The author plans to distribute the CQI project completion feedback form during the scheduled April 2001 Outbreak Response Team meeting; that meeting is anticipated to conclude the author's immediate involvement with the team following the completion of the field guide and the data collection system. The author will continue to support the team in developing performance standards because the current baseline information is not sufficient for establishing performance targets.

Additional Projects

This section provides results of five projects not described in chapter IV, namely, (1) consultation with the Parks Department, (2) consultation with the Circuit Court Friend of the Court phone staff, (3) evaluation of the Seven Habits of Highly

Table 28

Clients' Comments on Author's Consultation with the Outbreak Response Team

This meeting added value because:	What could I do to make these meetings more valuable in the future?
Helped to clarify the urgent issues.	The same; keep people on task.
Brainstorming helped to bring out potential problems.	Set goals and objectives.
Set top areas to work and goals to set them in motion.	I have nothing at this time. Value will be added by the task groups.
Identified group weaknesses – took steps to establish action groups to determine how to fix problems	Have on open minded – positive attitude toward the evolution of this team as it progresses through the quality improvement process.
It makes you see the areas that need improvement and ways to work on them.	Nothing. Keep on schedule.
There was participation of diverse members.	
We discussed and identified important issues, then took action.	
Provides structure and organization to what we do.	
We discussed needs/gaps/solutions to our teams response capabilities. Task forces were created in order to concentrate on important agreed to issues and needs.	
Organized processes to improve the operation of the team.	

Effective People workshops, (4) Committee of the Whole meeting length, and the (5) Kalamazoo criminal justice system process mapping project.

These five projects were included in this chapter because they demonstrate aspects of the author's performance consulting internship in addition to those captured by the three projects described above, such as anecdotal data, data collection by staff, evaluation of a training program, data-based decision-making, and a progressive aspect of the author's internship. Each project will be described briefly followed by the presentation of the results. Table 29 provides a summary of the process and accomplishment measures per project; performance measures could not be collected on these additional projects because of their long-term nature.

Consultation with Parks Department

In December 1999, a CQI Steering Team member from the Parks Department invited the author to make a presentation on County CQI. The team member was interested in informing all Parks staff about CQI and in conducting CQI projects within the Parks Department. The author attempted to work with Parks staff on projects that would provide early successes and generate subsequent support from all Parks staff.

During his first meeting with Parks staff in January 2000, the author made a slide presentation about CQI and conducted the BEM exercise (see Figure 15). Since then, the author has met monthly with Parks staff in what is the department's only all-staff meeting. Typically, staff met in small teams (i.e., rangers, office staff,

Table 29

Summary of Results for Additional Projects

	Process measures	Accomplishment measures
Consultation with Parks Department	Reduced duration of team meetings (anecdotal data) Acceptance of new mission increased 39% over previous mission	Developed new mission statement Staff mapped fairground reservation processes and developed improvement plan
Consultation with Friend of the Court phone staff	Average calls received per month = 8,000 Number of angry callers: 21 (.23%) Wrong calls: 103 (1.14%)	Project specific data collection log
Training evaluation: "Seven Habits"	Self-reported use of tools: 83% planner/calendar 73% personal mission statement 68% compass and goal setter	Conducted first-time evaluations on program cost, participant use of Seven Habits (return rate 48.5%), and focus groups
Committee of the Whole meeting length	Data collection in place Meeting length reduced from 2.48 hours to 1.65 hours	Graphic representation of archival and current meeting data
Criminal justice system process mapping	Established minimum baselines for felony case duration for in-custody cases (16 weeks) and for non-custody cases (26 weeks)	Developed first system-wide felony case flow process map in U.S.

and fairground and maintenance staff). Cross-functional meetings consisted of weekly supervisory meetings (i.e., strategy team) and weekly office staff meetings.

This project was included because it provided an example of the author's use of anecdotal data and of introducing the evaluation of mission statements. Measures on these two projects can be considered process measures because they were not designed to measure possible impact on performance improvement within the Parks Department.

Reducing the Duration of Team Meetings. While working with a task force charged to improve communication and information flow within the department, the author was informed that long team meetings took away too much time from other duties. The author asked for estimates of meeting duration; at the following department meeting (April 5, 2000) task force members reported the their estimates in a graphic format. Parks staff decided to reduce meeting times particularly for the ranger and strategy team meetings. Each team provided team updates during subsequent monthly department meetings. During the last Parks Department meeting in 2000, the author asked staff (n = 14) about the duration of recent meetings. The author plotted the consensus-based estimates as a bar chart; he also added bars for the duration estimates reported in April. Parks staff, however, disagreed with their earlier estimates as being too high. Figure 30 shows the total weekly meeting duration for the first part of 2000 as reported to him in April and in December, and the December estimates of the then current meeting durations.

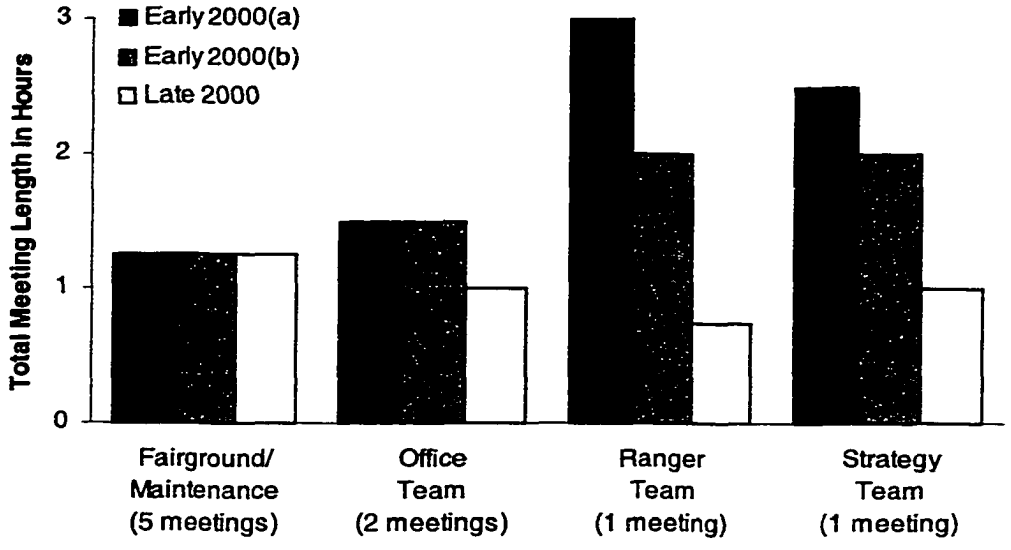

Figure 30. Total Average Hours Parks Department Teams Reportedly Spent in Meetings per Week.

Early 2000(a): Staff estimates of meeting duration early 2000 (April 5, 2000)
Early 2000(b): Revised estimates (December 6, 2000)
Late 2000: Staff estimates of meeting duration late 2000 (December 6, 2000)

Staff agreed on these hours and reported different "reasons" for the decrease over the summer. For example, park rangers reported that they did no longer discuss items that may affect only one or two rangers; the strategy team reported spending less time on non-agenda items.

Exact meeting durations could not be ascertained from archival time logs. Staff told the author that they did not record actual meeting times but the total time they spent in a particular location that includes time prior to and after a meeting.

Parks Department Mission Statement. As part of his consultation with the Parks Department, the author used one Parks Department meeting to begin the

development of a performance logic diagram (Appendix Z) based on Rummler's performance logic (Rummler, 1998; Rummler & Wilkins, 1999). As part of this exercise, the author reviewed the Parks Department's mission and vision statements, developed in 1996 by an outside consultant and four Parks staff (one of whom is still working in the department). The mission statement was "As gracious hosts, we provide quality recreational facilities and experiences for our guests. We operate as a team of professionals to create, manage, and maintain public recreation facilities." Several staff expressed dissatisfaction with the mission statement's wording, and one staff remarked that he had "never" seen that mission statement before. The author took that opportunity to suggest that the department revisit the mission statement, and, if necessary, revise it prior to continuing the department-wide CQI process. At the beginning of the review session one month later, the author distributed an anonymous survey as part of County CQI's emphasis on data collection for determining the impact of change.

This mission statement survey listed the four statements: (1) the mission statement reflects the Parks Department's reason for being, (2) I like the wording of the mission statement, (3) I feel that my job is represented by the mission statement, and (4) I use the mission statement as a guideline for my job. The author asked staff to indicate whether they agreed or disagreed with these statements. The results were tallied immediately. Fifty-one percent of the responses agreed with these four statements while 49% disagreed. Based on these numbers, Parks staff and department head agreed to revisit the mission statement.

The author used the same goal statement job aid he used for developing the CQI team's mission (Brethower, 1984). Using that job aid, staff created the following new mission statement: "The mission of the Kalamazoo County Parks Department is to manage parks and fairgrounds for people to enjoy." At a CQI meeting two months later, the author re-administered the anonymous survey and tallied it immediately. Because only nine staff were at this meeting, the author asked the administrative support staff to provide the survey to other staff during the following week. Four additional surveys were completed.

Figure 31 summarizes the approval ratings for the old and the new Parks Department mission statements. Acceptance ratings increased from 51% to 71% (+39%). Disagreement ratings decreased from 49% to 29% (-41%). The Parks Commission accepted this mission statement with minor changes in October 2000;

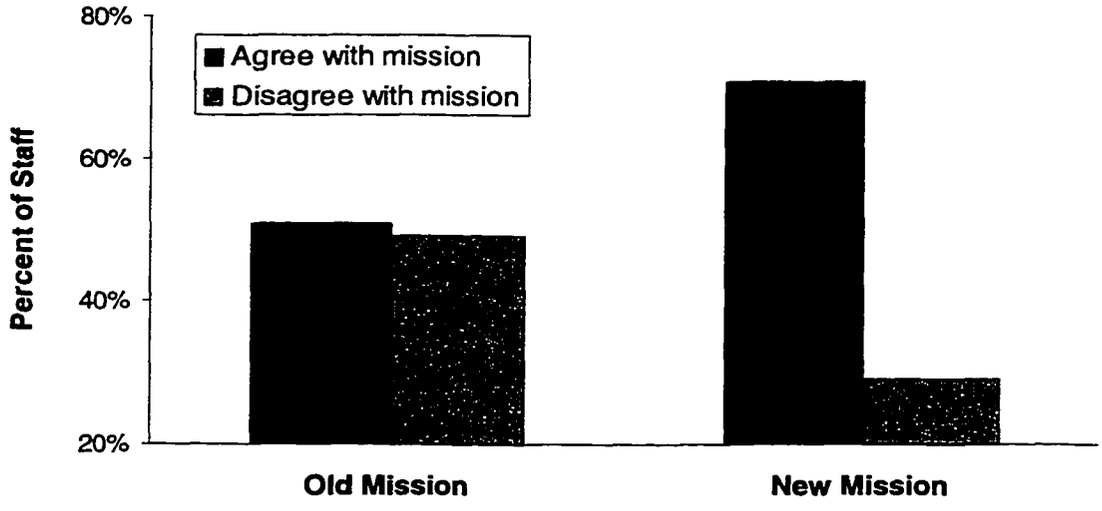

Figure 31. Summary of Responses of Agreement and Disagreement with Four Assertions about the Parks Department's Old and New Mission Statements.

these minor revisions were subsequently approved by all Parks staff in the December 2000 department meeting.

Other Parks Department Projects. In addition to these two projects, the author is currently working with the Parks Department staff on improving the processes for parks and fairground reservations; in December, staff generated, on their own, a process map for the fairground reservation process and developed an improvement plan. Additional projects were suggested by each of the four departmental teams to provide a better focus on staff-specific performance concerns.

Consultation with Friend of the Court Phone Staff

In March 2000, the author was asked by the Director of the Human Resources department if future CQI training will include customer service. The author noted that it was likely that CQI training will be offered in the future but that specific contents had not yet been identified. The author was told that a supervisor in the Circuit Court's Friend of the Court (FOC) unit was planning to hire a consultant to conduct customer service training for her phone staff. The author contacted the supervisor about the possible performance problem. He learned that the supervisor was planning to conduct a training session to relieve the stress telephone operators were experiencing due to verbal abuse from angry callers. The supervisor furthermore reported that most staff were well trained but that a half-day refresher could not hurt. The author suggested that this sounded like a problem that a one-time training would most likely not solve and offered to meet with the phone staff. This

project was included because it illustrates how data collected by staff contradicted staff perception of a problem (i.e., wrong calls and angry callers). The results described below are examples of baseline process measures because the author did not change existing processes or improved staff performance.

Friend of the Court Phone Operations. "The Friend of the Court is the investigating, accounting, reporting, and enforcing agency of the Circuit Court for domestic relations cases involving child and/or spousal support, child custody, and parenting time matters" (Kalamazoo County, 1999). The FOC handles about 18,000 open cases (Kalsnes, 2001). FOC receives about 16,000 to 18,000 phone calls per month; of these, the phone staff field approximately 8,000 calls (personal communication, D. Dewey, January 15, 2001). Most calls received by the phone staff involve questions about the child support payments and case progress.

During the first meeting with three phone staff and two supervisors (March 31, 2000), the author was told that some callers were angry because they may have waited on hold for a long time, or because they urgently needed their support check to make rent or utility payments. At times, staff discovered after some questioning that the caller was calling the wrong office (e.g., they needed to talk with an attorney or find out how to pay a traffic ticket) or the wrong county (files are kept in the county of the original lawsuit, not in the county of the payee's residence). Wrong phone calls allegedly contributed to the problem of angry callers because it required callers to be on hold longer.

Customer Service Phone Log. Following the first meeting the author developed a data collection form (Appendix AA). The author informed staff that such data would enable him to develop possible solutions to the alleged problem. Data collection began April 24, 2000, and was planned for three weeks, with the first week as practice. The author visited phone staff three times during the first three weeks of data collection. He asked staff to show the current data sheet and checked for any questions or concerns; he praised any form of data collection, and made corrective suggestions. In addition, the supervisor reminded staff to collect those data. Based on the average number of 8,000 phone calls per month, the author expected a high count of both wrong calls and angry callers. As logs continued to show low numbers, the author extended the data collection period for two more weeks for a total of five weeks (April 24 through May 26, 2000).

Number of Angry Callers. Figure 32 shows the total weekly number of callers who either were angry when staff answered the phone or who became angry during

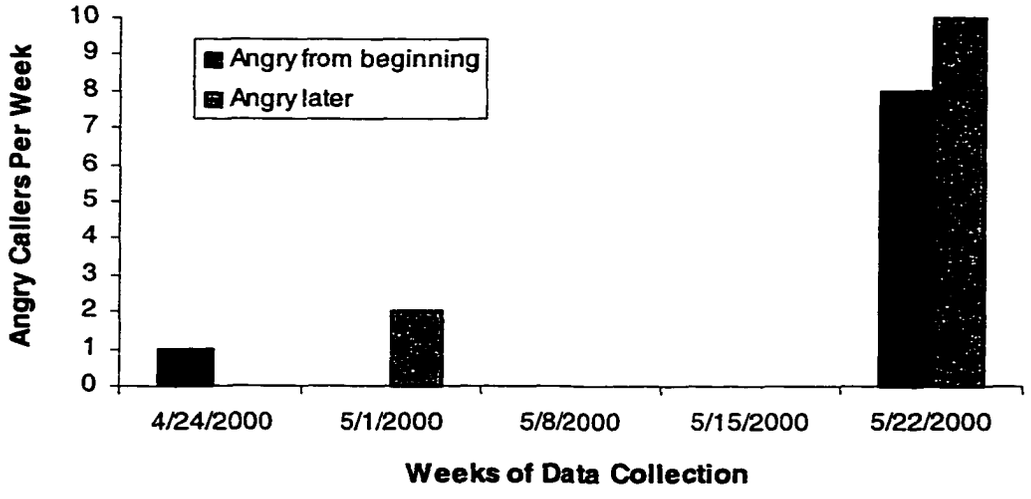

Figure 32. Total Number of Angry Callers per Week.

the phone call. The total recorded number of callers during that time period was 21. This reflects .23% of the approximately 9,000 calls received during that time period. (This is based on the average number of monthly phone calls as reported by Information Services.) Records showed that staff did not mark any angry callers during the third and fourth week of data collection.

Wrong Calls. Staff logged a total of 103 wrong telephone calls, or 1.14% of approximately 9,000 calls received. Figure 33 shows wrong calls as percent of all calls received during the data collection period from April 24 through May 26, 2000. According to the phone logs, the largest number of wrong were calls intended for the Office of the Prosecuting Attorney (OPA) with 46 calls in five weeks (0.51% of total calls received).

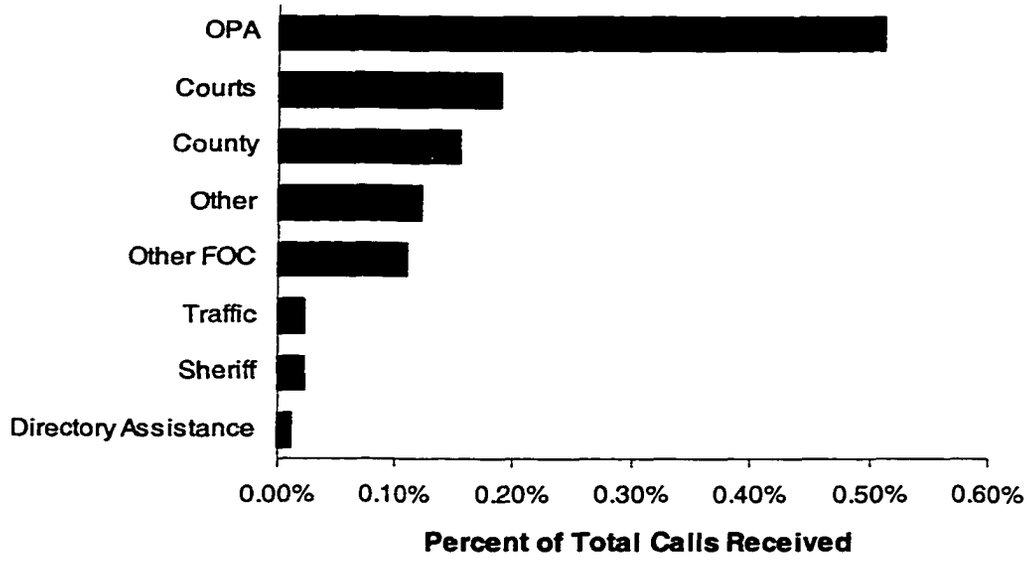

Figure 33. Wrong Calls as Percent of Total Calls as Recorded by Friend of the Court Phone Staff between April 24 and May 26, 2000.

The author shared these results with the County Administrator as part of their regular progress meetings. The County Administrator appreciated the fact that the author collected baseline data early in the project.

Difficulties with Data Collection. During the first two weeks of the data collection, the author questioned the low count, based on staff information obtained at the first meeting. On several occasions during the author's visits, staff could not immediately locate the telephone log or, when the log was empty or showing a low count, reported that they did not have the time or would forget to make the necessary hash marks for each wrong call and each angry caller. They also commented that the phone log itself was too long, and that they did not have time between phone calls to make hash marks for both wrong calls and angry callers.

Consultant Study. When the author began his consultation with the FOC phone staff, he was not aware of the fact that an outside consulting agency had just completed a study which recommended improvements to the entire Friend of the Court operation (Plante and Moran, 2000). When the author was informed about this, he obtained a copy of the consultant's report and reviewed the report with respect to all items that could pertain to customer service staff's phone operations.

He addressed the report's recommendations with the phone staff. Recommendations included an automated interactive voice response (IVR) system to automatically answer and direct calls, a web page, a telephone hotline for frequently asked questions, and improved cooperation with the phone staff and FOC case workers. One of the supervisors was a member of one of the teams charged with

implementing the consultant's recommendations. She agreed to keep her staff informed of the implementation progress and to discuss how changes might affect phone staff's operations.

The IVR became operative in January 2001. It is available 24 hours a day, seven days a week (Kalsnes, 2001). The author suggested prior to concluding the project that phone staff resume data collection following the IVR implementation to assess possible changes in the number of wrong calls and angry callers.

Room Temperature. An additional concern of the FOC phone staff related to the temperature in their work area. Staff reported that the room was too warm in the summer and too cool in the winter. They reported that the Building and Grounds Department could not remedy this situation because the ceiling ducts did not allow a different air flow. The author offered to discuss this work environment issue with the County Administrator suggested that staff record the room's temperature to generate supportive data (the room contained a built-in thermometer).

The author's last meeting with the FOC phone staff was in August 2000. This was the third meeting for this consulting project. Over a period of five months the author attempted to contact the phone staff supervisor to inquire about the status of the implementation project and the room temperatures. Changes in supervisory personnel, however, prevented a response prior to December 2000.

Training Evaluation: Seven Habits of Highly Effective People

One of the author's initial assignments was to evaluate the county's Seven Habits of Highly Effective People (Seven Habits) training program. In July 1999, the training had been conducted for approximately three years by one county staff who was a certified Seven Habits facilitator. In August, the author met with that facilitator (who was also a member of the CQI Steering Team) to learn more about the Seven Habits training program, and to find out what type of evaluation he had conducted. This project was included because it illustrates internal efforts in evaluating a training program beyond initial participant reactions. The results described below are examples of accomplishment and process measures. They are accomplishment measures in that they document the author's efforts in collecting data and designing an evaluation process; they are process measures in that an evaluation process was introduced that generated recommendations for change, some of which were piloted.

Seven Habits. The Seven Habits training program is based on principle-centered habits (Covey, 1989). It provides learners with seven principles (or habits) under the assumption that engaging in those habits will make them more effective in both professional and personal lives. These habits are: Be proactive, begin with the end in mind, put first things first, think win-win, seek first to understand then to be understood, synergize, and sharpen the saw.

Members of the county's executive staff were first exposed to this training program in 1996 when they attended a Seven Habits workshop at Upjohn, Inc. (now Pharmacia Corporation). The administration decided to install this program for

county employees. Subsequently, the facilitator obtained instructor certification from Franklin Covey, the Salt Lake, Utah, based company that markets the training workshops and accessories, such as planners. In October 1996, the facilitator conducted the county's first training session.

Evaluation. When the author began the evaluation project in August 1999, no evaluation other than immediate participant reactions had been collected, using feedback forms provided by Franklin Covey. Neither had the actual number attendees nor the training's cost been calculated. The author began his consultation by collecting information about the program's cost and the number and type of participants.

Program Cost. The author obtained from the facilitator the cost for facility rent and food, profiles (a 360 degree feedback instrument for all participants), and class material. He then asked the county's Finance Director for an estimate of the average salary and benefits for managerial and professional staff; those two staff groups made up the majority of trainees at that time. Figure 34 shows cost for each of these items for an average workshop cost of $1,134.15 per participant. At that time, an average of 22 staff attended each workshop; thus, the cost for each workshop was approximately $24,951. At the time of this cost analysis, a second county staff had obtained facilitator certification. Including the one-time certification cost for both facilitators, the 12 workshops conducted at that time for 211 of 943 full-time employees cost the county a total of $304,415. The projected expense for training all

remaining employees was $823,000 for a total of $1,127,415. The County Administrator asked the author to share this information with the two facilitators.

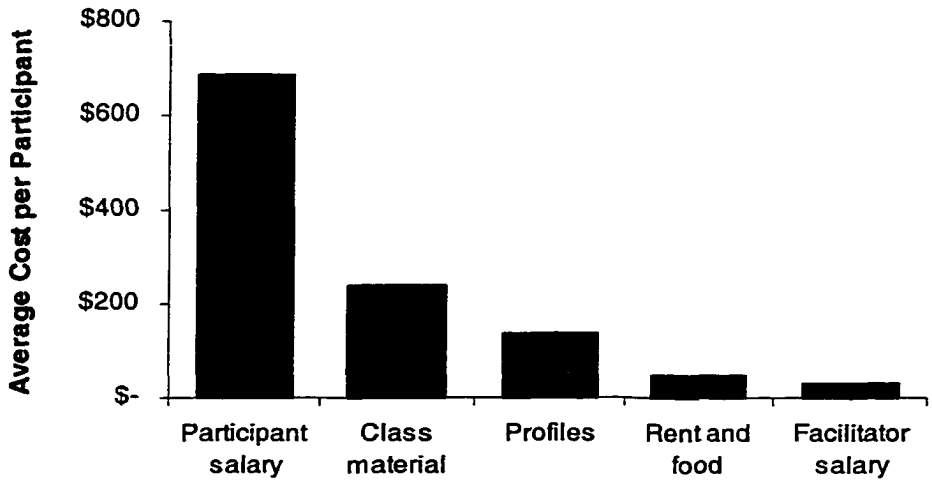

Figure 34. Average Cost of Seven Habits Workshop Categories per Participant.

Program Participants. Per County Administrator request, the author compiled, also for the first time, a master list of all Seven Habits attendees per department and employee classification (i.e., managerial, professional, technical, and union staff); this list included attendance percentages for each department. The County Administrator shared this master list with all department heads and elected officials. This list is now maintained by Human Resources staff.

Designing the Evaluation. In September 1999, the County Administrator convened a team consisting of himself, the author, the two facilitators, and the assistant director of the HR department to evaluate the Seven Habits training. The team identified the purpose of the training as creating a culture that better enables employees to be more effective.

The author also reviewed a Franklin Covey promotional piece describing their program for conducting an impact analysis for Seven Habits (Franklin Covey, 1998). This evaluation was based on self-ratings using "before-now" measures. The "return on investment" impact level assessed whether the training effort paid for itself. The evaluation material and analysis would cost the county $8 per person, or more than $1,600 for the 211 staff trained at that time, not including staff time of completing the survey (estimated at about 30 to 45 minutes for over 80 items.)

To learn more about this evaluation system, the author and the two facilitators conducted a conference call with a Franklin Covey training representative and the Director of Impact Analysis from the Franklin Covey Center for Research and Assessment. The Director noted that their own Seven Habits evaluations of participants who attended training 3 or more years ago (as was the case with Kalamazoo County) had been difficult because most attendees would only sporadically engage in the seven habits. He also pointed out that after five years most participants revert back to their pre-training habits (personal communication, T. W. Bothell, September 20, 1999).

The evaluation team decided to conduct the evaluation in-house. To develop an appropriate strategy, the author introduced team members to Brinkerhoff's training impact map (R. O. Brinkerhoff, class material, March 9, 1999). The purpose of the evaluation crystallized over several meetings: The County Administrator supported the training program but wanted to obtain information that showed how the training was helping county employees in their jobs. Initially, the team planned to survey

participant's supervisor to obtain performance ratings of both Seven Habits graduates and of staff who had not participated in the training. The difference in ratings could, presumably, be attributed to some degree to the Seven Habits workshops. The author suggested to conduct an evaluation modeled after Brinkerhoff's success case method (Brinkerhoff, 1987) because of a lack of existing performance standards and because the response cost on part of the supervisors would most likely not generate a high enough return rate. The success case evaluation method attempts to identify training graduates who excel in applying what they learned at the training so that successful components of the training can be built back into later iterations of the training workshop.

The team developed a survey to find out which of the workshop participants reported using the Seven Habit tools distributed at each workshop (Appendix BB). The premise was that this option would generate more reliable results than asking participants about changes in their performance.

Survey Results. Of the 235 participants surveyed, 114 (48.5%) returned completed questionnaires. Figure 35 shows responses for the survey's five questions. With respect to a sometimes or all the time use of tools, 83% of all respondents indicate they use the planner/calendar, 73% indicated that they use their personal mission statement, and 68% indicated that they use the compass and goal setter. These data had not been available before.

Participants were also asked to indicate if they would like a refresher course; 52% answered "yes" and 48% answered "no." Finally, the author categorized the

optional comments (n = 100; 87% of all responses) in positive, negative, and mixed comments. Seventy percent of comments were positive, 20% negative, and 10% mixed.

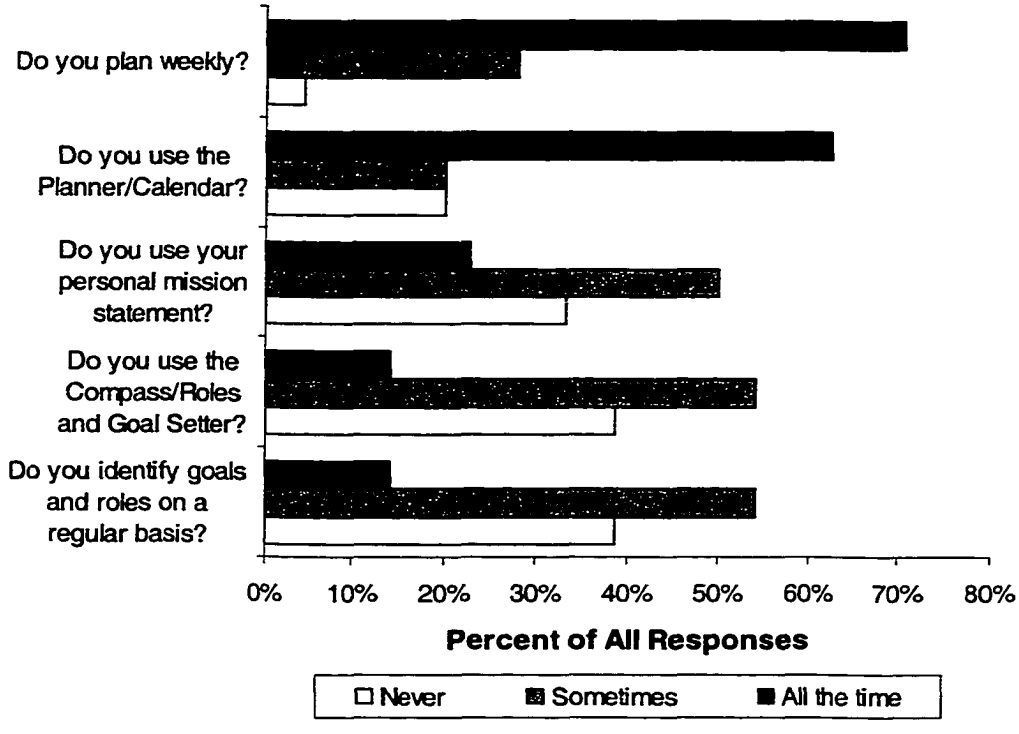

Figure 35. Survey Responses per Seven Habits Tool.

Focus Groups. The evaluation team identified the top ten high and low use participants and invited them to participate in focus groups to develop suggestions for improving the workshops. On June 1, the author, supported by Western Michigan's Seven Habits facilitator as subject matter expert, conducted the low-use focus group with 4 participants; on June 2, he conducted the high-use focus group with 5 participants. The author invited participants from the high-use focus group to write an article in the newsletter and to report to the Board of Commissioners how the Seven Habits affected their lives. The author briefed the evaluation team on

comments provided by the participants. The team then generated ideas for improvement.

Communication of Evaluation Results. Following the conclusion of the evaluation project, the author wrote an article for the August 2000 newsletter reporting the results of the Seven Habits survey and focus groups; the article also included improvement plans developed by the team based on focus group input. The newsletter article contained three graphs summarizing the aforementioned survey results. On October 3, 2000, the senior Seven Habits facilitator reported these findings to the Committee of the Whole, using the available cost, participant, and evaluation data. One participant of the high-use focus group provided a personal account which was published in the September 2000 County Connection.

Follow-Up. In December 2000, the author asked the senior facilitator which of the published improvements had been implemented at that time. The improvement suggestions were (1) to provide one-day follow-up sessions and information about using the planner, (2) to pilot a process for supporting participants in interpreting of the personal profiles, (3) to offer a coach/mentor program, (4) to pilot a three-days-in-a-row version of the workshop which is typically conducted over three weeks, (5) to ensure that each participant has completed a personal mission statement by the last day of the workshop, and (6) to conduct regular focus group meetings once or twice per year. The facilitator reported that suggestions 2 and 4 had been piloted with mixed results. A framework is in place for participants to complete workable drafts of personal mission statements (suggestion 5).

Committee of the Whole Meeting Length

In February 2000, the County Administrator asked department heads and management staff for input regarding changes to the board's meeting schedule proposed by Commissioners. Specifically, Commissioners were concerned that the 4:00 p.m. Committee of the Whole (COW) board meetings were generally too long and thus did not leave enough time before the 7:00 p.m. board meetings for dining out and for preparing last minute items; instead, dinners had to be catered to the Board Office. Other concerns were that agendas included too many routine and unimportant items which took time away from policy discussion. The County Administrator offered several scenarios for comment, including a reduction in the number of COW meetings.

The project was included in this chapter because it illustrates the author's role in supporting data-based decision-making. The reported measures are examples of accomplishment and process measures. They are accomplishment measures in that they report the author's use of data collection and analysis to support change in meeting preparation and facilitation; they are process measures in that they contributed to reducing meeting length.

Committee of the Whole. The Committee of the Whole was established several years ago upon Commissioners' request. Up to that point, each County Commissioner served on several standing committees, such as the finance or human resources committees. When the Board of Commissioners had to make policy and budget decisions, committee members who sat on these committees updated the other

Commissioners. This was perceived as cumbersome and as taking away time from the board meeting. As a solution, Kalamazoo County Government instituted the Committee of the Whole; that is, the whole county board meets as a committee. Meetings are typically scheduled bimonthly on the afternoon before the Board of Commissioners regular Board meeting, unless special meetings are scheduled (e.g., annual budget information meetings, meetings with area legislators). The COW serves informational purposes only; all policy decisions, resolutions, and contracts are approved during the regular televised Board meetings.

Author's Consultation. On February 11, 2000, the author responded to the County Administrator's request for comments to the proposed schedule changes. He suggested that the proposed solution might effectively reduce the number of monthly meetings but that it would be likely that fewer meetings may last longer than current meetings because all the routine/unimportant items would still be on the agenda. He suggested exploring potential causes of the problem and making objective decisions based on data from past meetings. He further suggested that changes should later be evaluated for continuous improvement.

The County Administrator asked the author to compile a brief that included responses from other department heads and management staff. These responses expressed additional reservations about reducing monthly meetings, such as an increase in the delay of grant and contract approvals, no reduction in Board staff work load, and questions by the public about Board commitment to citizen concerns. The

author's brief was presented to the Commissioners during the March 2000 strategic planning retreat.

Data Collection. Following the retreat, the County Administrator asked the author to gather archival data from past COW meetings since 1997 to compare the average meeting length per chairperson. An administrative assistant reviewed each year's COW meeting minutes and recorded the length of the meeting, the number of agenda items, the number of presentations, the number of non-agenda items commissioners wished to review, and whether or not an executive session was held. The author analyzed and graphed the information as follows.

First, the author graphed the average length of COW meetings from 1997 through May 2, 2000. Figure 36 shows that the average meeting length increased from 1.86 hours in 1997 (Chairperson Houtman) to 2.50 hours in 1999 (Chairperson Wenke). The Year 2000 meeting data reviewed at that time included meetings

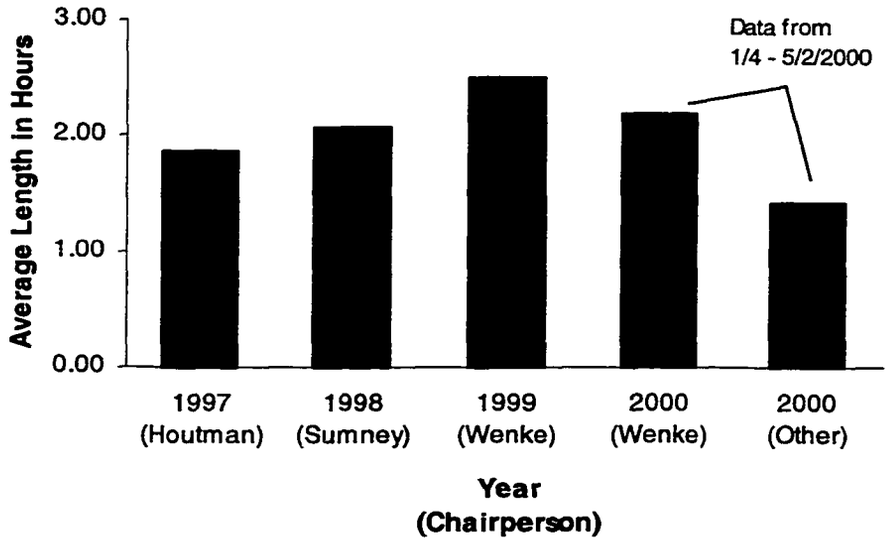

Figure 36. The Average Length of Committee of the Whole Meetings from January 1997 to May 2, 2000.

between January 4 and May 2, 2000. COW meetings chaired by other commissioners during Wenke's absences were about 45 minutes shorter on the average than meetings conducted by Wenke. These data suggested that the different average meeting lengths could be a function of differential facilitation skills.

Following this initial analysis, the author attempted to identify meeting components that might correlate with the meetings' overall lengths. Figure 37 shows Pearson-Product moment correlations between meeting length and the four meeting elements described earlier. The highest correlation was found between meeting length and the number of agenda items.

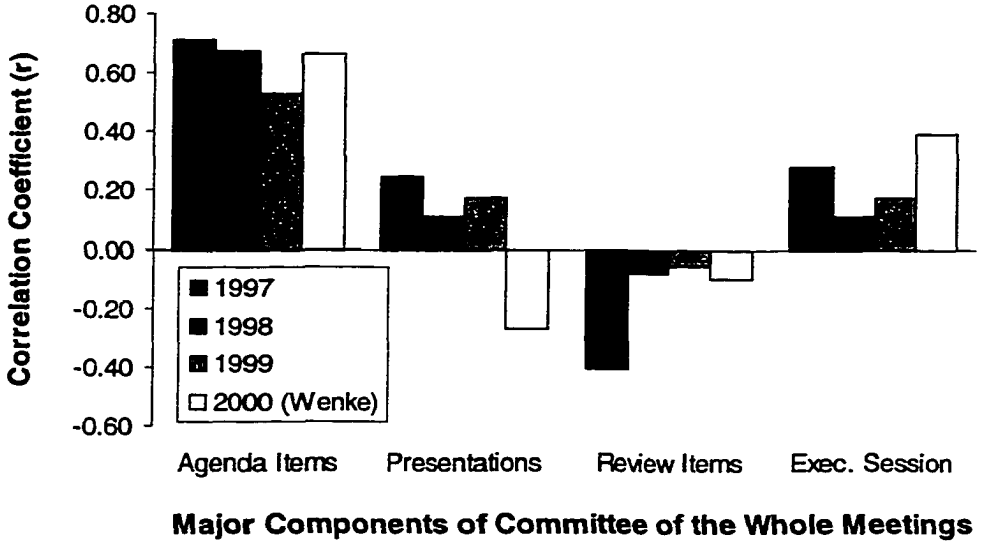

Figure 37. Correlations Between Meeting Length and the Four Major Components of Committee of the Whole Meetings.

On May 10, 2000, the author reported his findings to the County Administrator who provided this information to the Board Chair and Vice Chair. On July 19, 2000, per request, the author wrote a memo with updated graphs commenting

on the average meeting length, average number of agenda items per meeting, the average time per agenda item, and the correlations described above. The County Administrator added a cover letter and shared this memo with the Commissioners.

Follow-Up. The County Administrator reportedly shared these two communications with the Board leadership but did not further pursue the issue. Figure 38 shows a change in meeting length between the last meeting in May 2000 and the first meeting in June 2000. The average meeting length decreased from 2.48 hours between January 5, 1999 and May 16, 2000, to 1.65 hours, beginning with the June 06, 2000, COW meeting. The County Administrator asked the author to prepare a memo for the Commissioners in January of 2001, showing the complete 2000 data.

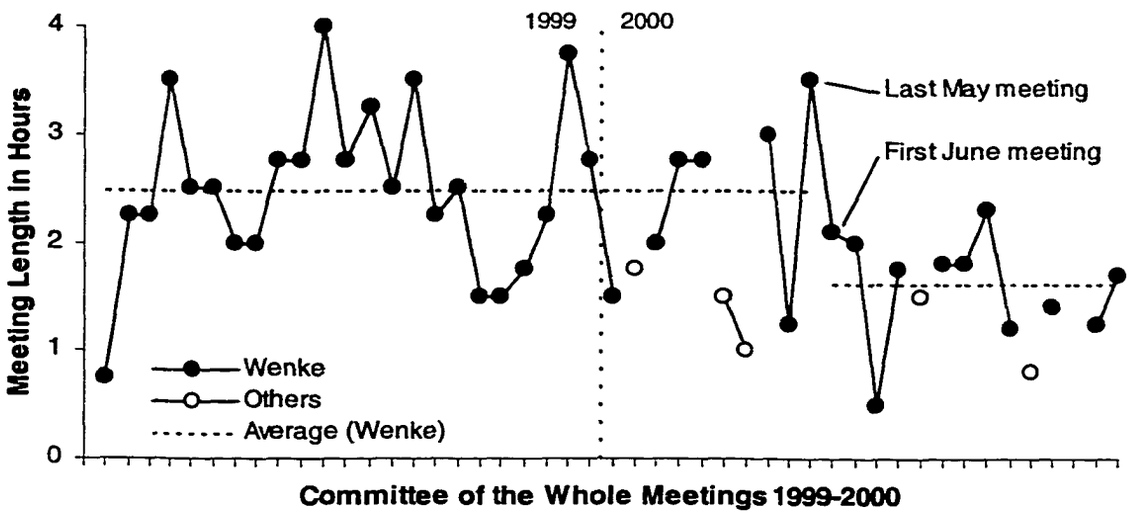

Figure 38. Average Length of Committee of the Whole Meetings in Hours from January 1999 to December 2000.

Contributing Factors. The reduction in overall meeting length was accompanied by a reduction in both the number of COW agenda items and the time spent on each agenda item. The overall average number of agenda items per meeting

decreased from 10.5 (January 1999 through May 2000) to 7.67 (June 2000 through December 2000). The average time spent per agenda item decreased from 15.1 min to 13.1 min. The county administrator reported that the meeting data affected his agenda preparation in that he attempted to reduce the number of agenda items. He reported also that the chairperson appreciated the data and that he was attempting to facilitate meetings more expeditiously and to spend less time on each agenda item (personal communication, R. D. Terronez, January 8, 2001). This information is anecdotal; the data presented here support this information but do not allow conclusions with respect to a cause and effect relationship.

Kalamazoo Criminal Justice System Process Mapping Project

The author selected this final project for inclusion in Evaluation I results because it illustrates the progressive nature of the author's internship as it connects directly to a previous intern's work with Kalamazoo County Government. It also exemplifies the author's involvement in working with a county-wide performance system: the Kalamazoo County criminal justice system. This criminal justice system consists of county government agencies, law enforcement agencies from county, cities, and townships, District and Circuit Courts, as well as federal and state correction and probation agencies.

The results reported below represent accomplishment and process measures. They are accomplishment measures in that they provide measures of the author's consulting efforts in working with a number of people from different agencies on

creating an important document; they are process measures because they represent a first set of baseline measures on felony case duration that were derived from the case flow process maps.

Kalamazoo Criminal Justice Council. In 1999, the Kalamazoo County Board of Commissioners retained the Institute for Law and Policy Planning (ILPP) to assess the current justice system and to analyze its facilities, specifically the county jail. The jail's chronic overcrowding frequently required emergency releases of prisoners. ILPP presented its final report to the citizens of Kalamazoo in April, 2000 (Institute for Law and Policy Planning, 2000). Its more than 80 recommendations included establishing the Kalamazoo Criminal Justice Council (KCJC).

KCJC consists of all major criminal justice agencies in Kalamazoo County, namely Adult Probation and Parole, the Eighth District Court, Kalamazoo County Bar Association, Kalamazoo County Sheriff's Department, Kalamazoo Department of Public Safety, Kalamazoo Township Police Department, the Ninth Circuit Court, the Office of the Prosecuting Attorney (OPA), and the Portage Police Department.

The council's purpose is to improve judicial services for the citizens of Kalamazoo County, to resolve justice system problems, and to identify system needs as they arise. One of the council's major responsibilities is to "encourage local planning activities in order to promote greater interagency cooperation, efficiency, effectiveness, and innovation" (Kalamazoo County Board of Commissioners, May 16, 2000b, p. 15233).

Process Mapping. One of the system-wide projects suggested by ILPP and one of the first project undertaken by the Council was the integration of more than 25 information systems into the Kalamazoo Justice Integrated Information Management System (K-JIIMS). On May 10, 2000, the KCJC Chairperson (who is also the county's elected prosecuting attorney) and the KCJC Executive Director asked the author to work with KCJC agencies in process mapping the entire justice system from arrest to post-adjudication. The Prosecuting Attorney suggested this project based on his previous experience with a consulting intern who mapped several of the OPA's internal processes. The author's sponsor granted temporary release from some of his duties as CQI Coordinator.

The official KCJC web site describes the purpose of the process mapping project as follows: "The first bedrock step in developing a plan for technological system integration or any other changes to our system, is to 'white board' our existing criminal justice system" (Available: http://www.kcjc.org/projects/index.htm). KCJC appointed management staff from each agency to form the process mapping team and to collaborate with the author. A tentative deadline was set to complete all agency maps within 90 days (i.e., the end of August 2000).

Project Consultation. On May 30, 2000, the author made a presentation to the process mapping team about process mapping, and how process mapping can support the implementation of the ILPP recommendations. At that meeting, the team decided to begin with the felony case flow because most jail inmates are felons waiting for their Circuit Court trials; the ILPP study argued that a reduction in felony case flow

time would have a direct impact on attenuating jail overcrowding. Following completion of the felony case flow, the team would then map the misdemeanor and the juvenile case flow, in that order. The author suggested to map the process in the same order a felony case proceeds through the system: from complaint and arrest to the prosecuting charging decision, District Court arraignment and pretrial, and, finally to the Circuit Court trial and sentencing. Each team member was asked to assemble a task force within his or her agency that would conduct the process mapping with the author. On June 8, the author began the process mapping with representatives from the Portage Police Department, Portage, Michigan. As Figure 39 shows, the author worked with 56 different participants to complete nine agency maps.

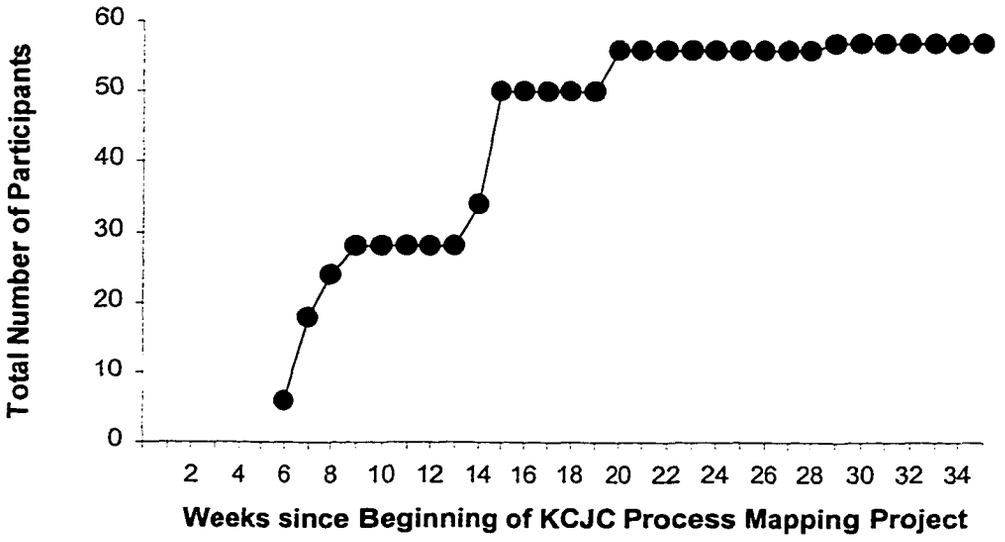

Figure 39. Cumulative Number of Criminal Justice Agency Staff the Author Worked with Since Project Begin, May 10, 2000.

Figure 40 shows the timelines for each of the individual mapping projects. With exception of the Prosecuting Attorney's office that did not have to start from scratch, each agency's mapping took several weeks. The numbers indicate the number of the drafts delivered to the agency for review; each process map required at least two drafts. The approval of the process map involved an informal sign-off by the agency's director or designee. This was recommended to the author by justice system consultants who suggested that such a sign-off would generate buy-in from each agency's top management and reduce the likelihood of unexpected surprises and embarrassment for top management later in the process.

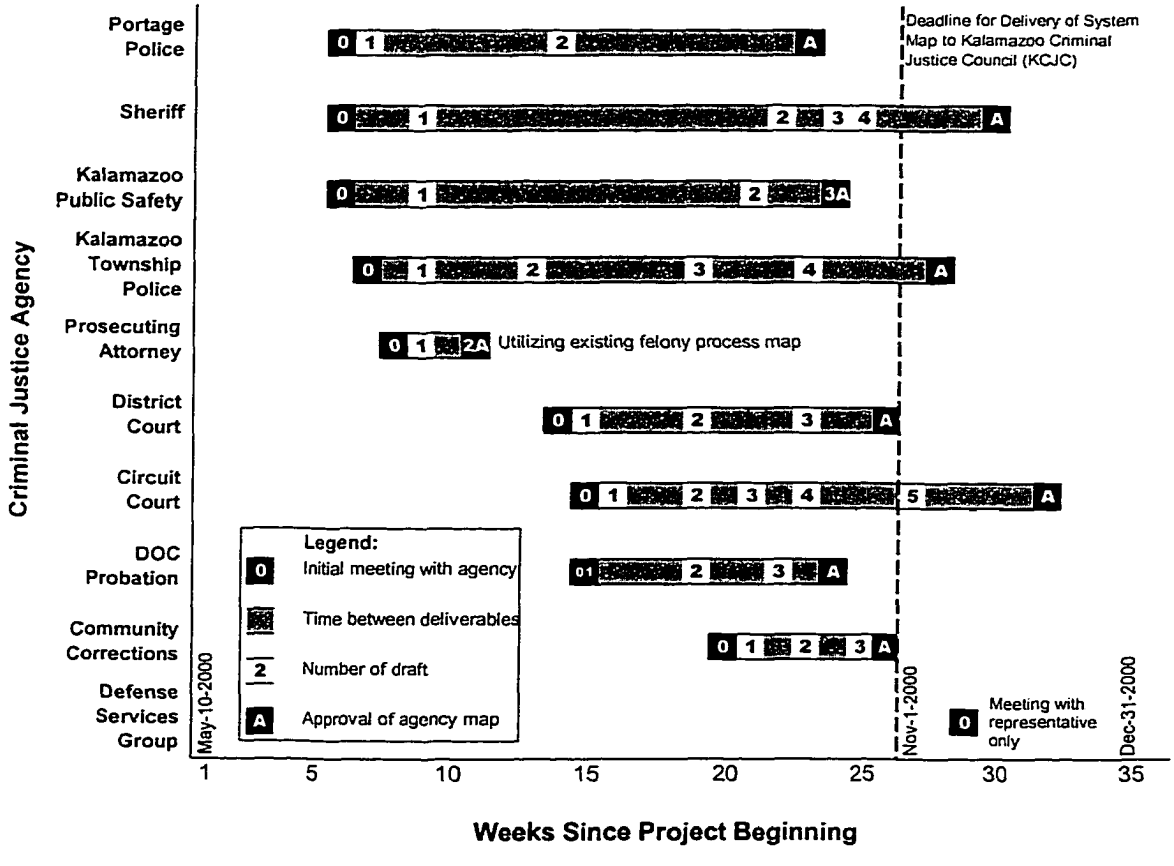

Figure 40. Duration of Process Mapping per Criminal Justice Agency.

Felony Case Flow System Map. In August, the KCJC set a November 1, 2000, deadline for completing a process map that showed the felony case flow through the entire system on a single map. This deadline was based on justice system consultants' recommendation that the process mapping should be completed prior to developing an integrated information management system.

To manage 31 meetings with 56 justice agency staff and the process mapping team, the author developed a status report form (Appendix CC) shared with the process mapping team at each meeting and also with the County Administrator who was the Council's liaison to the team. The introduction of the status report in September 2000 prompted several agency representatives to review drafts sent to them by the author several weeks earlier and to schedule additional review and process mapping meetings.

On November 1, the author presented the first draft of a system-wide felony case flow system map to the Chair of the Kalamazoo Criminal Justice Council. This system-wide process map summarized the detailed maps generated by each agency. On November 17, the author presented the system map to all members of the KCJC. He advised the Council that mapping the processes would enable the Council to not only lay a foundation for the integrated management information system, but also serve to record and communicate changes as each agency implements ILPP recommendations; he advised further that these maps would become a tool for managing the performance of the people working within the justice system. The Council recognized the process mapping as an effort "in assisting Kalamazoo in

becoming the first jurisdiction in the nation to have completed a system-map for their criminal justice system" (Kalamazoo Criminal Justice Council, 2000a).

Felony Case Flow Baseline Data. The author used the felony case flow system map to generate a minimum timeline for felony cases. (The map showed an ideal process in which a case was not adjourned and in which neither defense nor prosecution made any motions.) The timeline showed a case flow duration minimum of 16 weeks for in-custody cases and 26 weeks for non-custody cases. This difference is due to the fact that in-custody felony cases have statutory deadlines while non-custody felony cases do not.

According to anecdotal reports (personal communication, J. Fink, December 29, 2000) this was the first time this type of timeline had been generated. It was later used by the author to show how an expedited felony plea process, piloted by the courts, would reduce case flow by two weeks by reducing the (not required) delay between District Court preliminary exam and Circuit Court arraignment. Until this time, inaccurate estimates of time savings ranged from 30 to 45 days (Kalamazoo Criminal Justice Council, 2000b).

Cross-Project Consulting Dimensions

This section describes dimensions of consulting and consulting outcomes that spanned all of the author's internship projects. The dimensions were (1) relationship building, (2) project lineage, (3) transfer of technology, and (4) data collection and performance measurement systems.

Relationship Building

In order to develop a foundation for introducing the County Administrator's organization-wide continuous quality improvement initiative to all county employees, the author had to build relationships with both front-line and management staff. The author tracked his relationship building along individual professional contacts, teams he consulted with, meetings he facilitated or attended, and feedback he received from his clients.

Individual Professional Contacts. Individual professional contacts are defined here as one-on-one communications or consultations with officials and staff regarding performance and quality improvement issues. They do not include contacts that were part of normal work relations (e.g., conversations with administrative staff of the Board Office who provided clerical support or staff of the Finance department where the author's office was located) or communications that occurred in the course of meetings. Figure 41 shows that the author developed 52 professional relationships with county government staff.

Professional contacts from representatives from other organizations include members from other counties, past and current directors of the Southwest Michigan Quality Council (a Chamber of Commerce division), and the director of the Kalamazoo Community Mental Health quality improvement department. In addition, the author had several one-on-one meetings with members from agencies of the criminal justice system that are not part of county government. The author developed

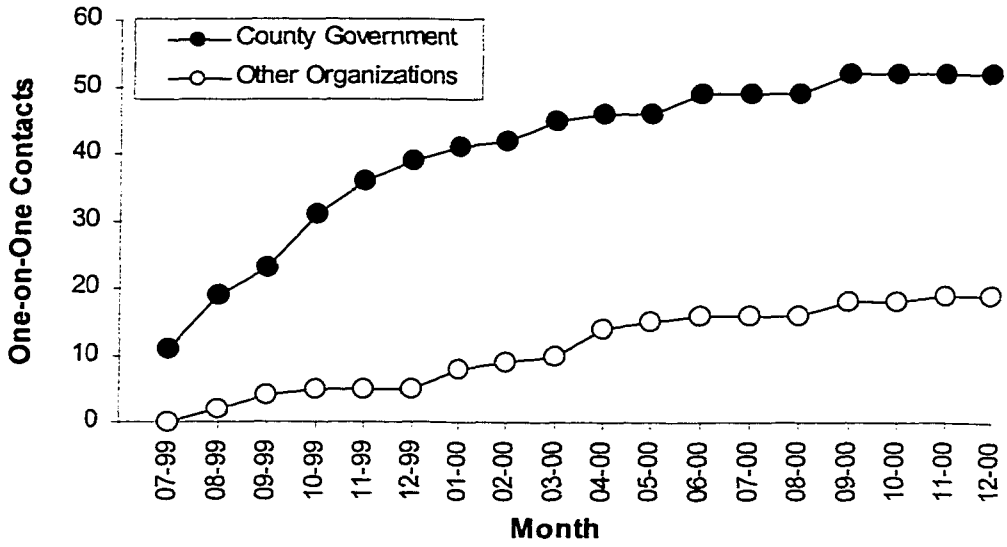

Figure 41. Cumulative Number of Author's One-on-One Professional Contacts With County Government Staff and with Staff from Other Organizations.

19 professional relationships with staff from other organization for a total of 71 professional relationships.

The author began the relationship building within county government by meeting individually with CQI Steering Team members, department heads, and elected officials to introduce himself, to learn about the department's role in county government and their past and current quality improvement efforts, and to provide information about the budding CQI initiative. These meetings were suggested by the author's sponsor, the County Administrator. The author used Brethower's interview guide (Appendix B) to ask systemic and systematic questions about individuals and their departments. Between July 14 and November 5, 1999, he conducted a total of 30 interviews with county staff and managers.

Teams Consulted With. Two-thirds of the author's projects involved working with various teams. For the present purpose, teams are defined as a group of clients consisting of two or more members. Teams the author worked with include the CQI Steering Team, the Grant Evaluation Team, the Outbreak Response Team and its process mapping and field guide task forces, Parks Department staff and its communication and process mapping task forces, Friend of the Court phone staff, the Performance Measurement Team, and the nine criminal justice system agencies.

Figure 42 shows that the author worked with a total of 21 teams throughout his internship. The 50% increase from 10 to 15 teams during June 2000 occurred as the author began the KCJC process mapping project.

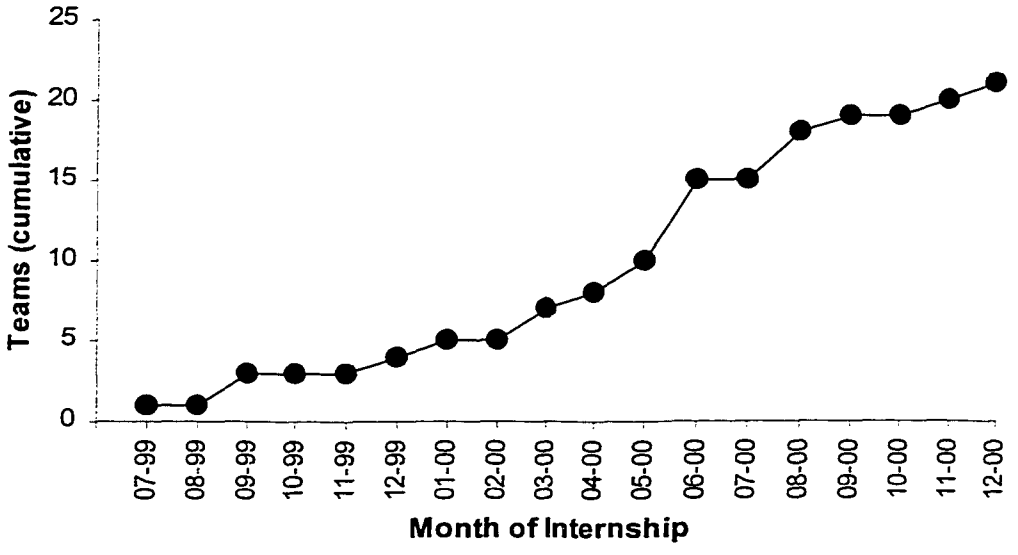

Figure 42. Cumulative Number of Teams the Author Consulted With.

Meetings Facilitated or Attended. As internal consultant, the author facilitated and attended a large number of meetings. The author's early records indicate that between July 12, 1999, and December 1, 1999, he spent 38.3% (160 hours) of his

time in meetings, including the aforementioned interviews. Figure 43 shows the cumulative number of consulting, information, and reporting meetings for the author's entire internship. The total number of meetings for the 17 months period is 276.

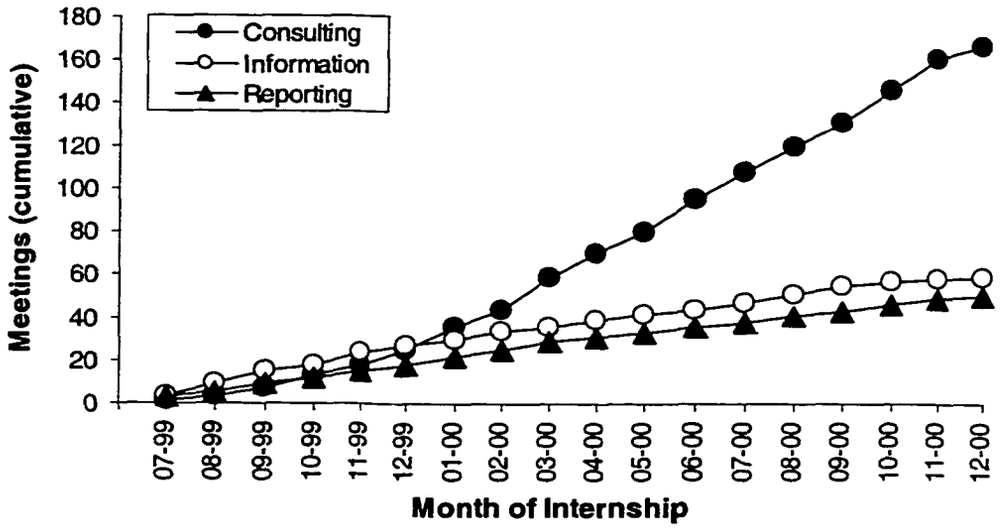

Figure 43. Number and Type of Meetings the Author Attended or Conducted During his Internship.

Consulting meetings were meetings with individuals or teams for which the author was providing some form of performance consultation. These consultation ranged from facilitating strategic planning (Appendix E, projects 1 and 19), developing survey designs (Appendix E, projects 3 and 11), and instructional sessions (Appendix E, projects 4 and 30) to process mapping (Appendix E, projects 10, 13, 14, 23, and 24). The author conducted a total of 167 consulting meetings.

Information meetings were meetings the author attended but to which he, usually, did not contribute. Information meetings included semi-monthly meetings

with the County Administrator's executive staff reviewing the agendas for next week's Committee of the Whole and regular Board meetings, meetings of the Kalamazoo Criminal Justice Council with the ILPP consultant, Board of Commissioner meetings, internal training sessions, and meetings of other organizations such as presentations of the Southwest Michigan Quality Council "Lunch-n-Learn" series. During his internship, the author attended a total of 59 information meetings.

Reporting meeting were those at which the author reported on the status of the county-wide continuous quality improvement initiative. Reporting meetings fell into two categories: Biweekly meetings with the author's sponsor, the County Administrator, and monthly meetings of the county's department heads and elected officials (DH/EO). Following the author's second DH/EO meeting, the meeting agendas included a regular item for CQI updates. During his internship, the author attended 50 reporting meetings, 34 progress meetings with his sponsor and 16 monthly DH/EO meetings.

Client Feedback: Formal/Public. In general, client feedback the author received fell into two categories: formal/public feedback and informal/private feedback. This section provides examples of both.

Examples of formal feedback were reported above for consultations on the internal grant review process and the outbreak investigation process. In addition, the author collected formal feedback following the deliverables developed for the community health profile project (Appendix E, project 10). Feedback collected with

the CQI project completion feedback form (similar to Appendix C) indicated that both clients agreed that the consulting added value. The author used the CQI meeting feedback form (similar to Appendix C) to collect participant feedback following the strategic planning meeting for family court supervisors (Appendix E, project 19). Thirteen of the fourteen court administrators and supervisors who attended completed the CQI meeting feedback form (one participant left early); all feedback forms indicated that staff perceived the meeting as value-adding.

Public feedback involved recognition at public meetings. For example, following the author's presentation of the system-wide felony case flow process map to the Kalamazoo Criminal Justice Council, the council's chair made the following remarks:

> Mr. Gregart thanked and congratulated Peter Dams in assisting Kalamazoo in becoming the first jurisdiction in the nation to have completed a system-map for their criminal justice system. He advised that Kalamazoo is well beyond the other jurisdictions, in that our first stage of the process mapping project is completed. (Kalamazoo Criminal Justice Council, November 17, 2000, p. 2)

Public feedback was also provided by non-county staff. For example, in their report to KCJC, two national criminal justice consultants made the following reference to the criminal justice system process mapping project:

> Several concrete steps [toward implementing recommendations of the justice system study] have already been taken. For example, PSRC [Pretrial Services Resource Center] staff were particularly impressed with the system maps prepared by Peter Dams, the county's Continuous Quality Improvement Coordinator. (Henry & Clark, 2000, p. 4)

Another example of non-county feedback was the "Performance Excellence Award" awarded by the Kalamazoo Chamber of Commerce in recognition of the CQI

Steering Team's strategic planning efforts. The author's application included the CQI mission and goals, a description of the CQI survey and rollout, as well as, examples of products generated by the team to support CQI in county government. The only other performance excellence award was given to a private sector organization for outstanding customer service (Jones, 2001).

The author also received formal feedback that was critical in nature. For example, two participants at the strategic planning meeting for family court supervisors commented on the evaluation form that the author should approach such meetings "with an open mind." A similar comment was made on the formal evaluation following the second meeting with the Outbreak Response Team (Table 28). The author did not receive critical feedback in public.

Client Feedback: Informal/Private. The author also received feedback of informal or private nature. This type of feedback occurred either directly or was forwarded from his sponsor. The author's sponsor forwarded to the author the following two e-mail comments:

> I wanted to let you know how pleased we have been with work and processes Peter has been helping us with. His development of the process mapping for the Community Health Profile will help tremendously with our resource allocation. Not to mention brought clarify [sic] to the whole process. . . . I was so impressed with it, I recruited his help with our "Outbreak Response Team's" process. I am equally pleased with the outcome, suggestions and enlightenment that has resulted. (R. D. Terronez, personal communication, January 20, 2000)

> I realize that it's probably "small potatoes" in what you do overall, but, I was especially impressed with the organizational chart for the county. I think I now understand county government! :-) :-) :-) (R. D. Terronez, personal communication, April 28, 2000)

Informal private feedback included clients' inquiries regarding the author's employment with Kalamazoo County Government following the opening of a full-time CQI Coordinator position. Several clients and members of the CQI Steering Team asked the author if he was leaving county government; some of them had been under the impression that the author was already a full-time employee.

The author also received some critical private feedback. For example, during the early phases of developing the CQI strategic plan several team members commented that they found the strategic planning process confusing and that it was not clear where the team was headed. During the later part of the internship, Parks Department staff commented that the continuous quality improvement process seemed very slow and that, after one year, not much progress had been made.

Client Feedback: Sponsor Evaluation. In February 2000, the author developed an evaluation form requesting mid-internship feedback from his sponsor (Appendix DD); this can be considered a hybrid between formal and private feedback. The evaluation consisted of three sections: (1) specific progress evaluation with respect to assigned projects, (2) evaluation of the author's professional competence, and (3) overall evaluation and suggestions for improvement. For sections 1 and 2 the author developed the following three evaluation criteria: 3 = progress exceeds expectations, 2 = progress meets expectations, and 1 = progress does not meet expectations; the sponsor was also invited to make additional comments. Section 3 consisted of agree and disagree ratings and open-ended questions. Sponsor and author reviewed the completed evaluation on March 31, 2000. The results were as follows.

In section 1 of the internship feedback form, the sponsor rated five projects as exceeding expectations (33%), five projects as meeting expectations (33%), and one project as not meeting expectations (7%); he did not rate four projects (27%). In section 2, the sponsor rated two professional competencies as exceeding expectations (29%) and five competencies as meeting expectations (71%). The sponsor commented that "projects and assigned projects [were] on time or deadline changes have been discussed and approved," that the author's professional expertise was a "very valued resource," that the author made good use of the information provided by the author, and that the author showed a "good" understanding of how Kalamazoo County Government operates. In section 3, the sponsor agreed that biweekly meetings with the author were helpful and that the author kept him informed about CQI in the county. He also noted that the author made "great use of [meeting] time via status reports." The sponsor also noted as a good aspect of this internship at that time that the "CQI team has started to develop cohesiveness. Variety of departments/County staff have realized benefit of HDT [sic] concepts." The sponsor stated that he had no recommendations for improving the author's consulting or or for the sponsor's and county's support for the author. The sponsor concluded that the author's "work on the Grants Review Team" was an unexpected benefit.

Project Lineage

This section provides data on the systemic nature of the author's projects in the county organization. Specifically, it presents information about project sources, project durations, project origins, and project penetration.

Project Sources. The author's primary client and source of projects was his sponsor, the County Administrator. Of the 31 projects listed in Appendix E, the County Administrator assigned 17 projects to the author (55%). Some of these projects related to the CQI Steering Team; that is, the sponsor suggested projects the author presented to and then conducted with the team, such as the CQI strategy, the inventory of expertise, and the team education. The author also conducted ten projects requested by other county staff (32%), as well as, four projects initiated by himself (13%).

Figure 44 shows that requests for consultations were not made until November 1999, the fifth month of the author's internship. All projects the author initiated occurred during the first nine months of the internship.

Project Duration. Figure 45 shows that the duration of author's projects ranged from one month (e.g., one or two meetings) to over 17 months. Thirteen projects (42%) were continuing past December 31, 2000; of these, three assigned projects were inactive because other projects (e.g., CQI rollout and KCJC process mapping) had a higher priority.

In many cases, project duration was dictated by the clients' schedules. For example, the Outbreak Response Team typically met every three months; this was

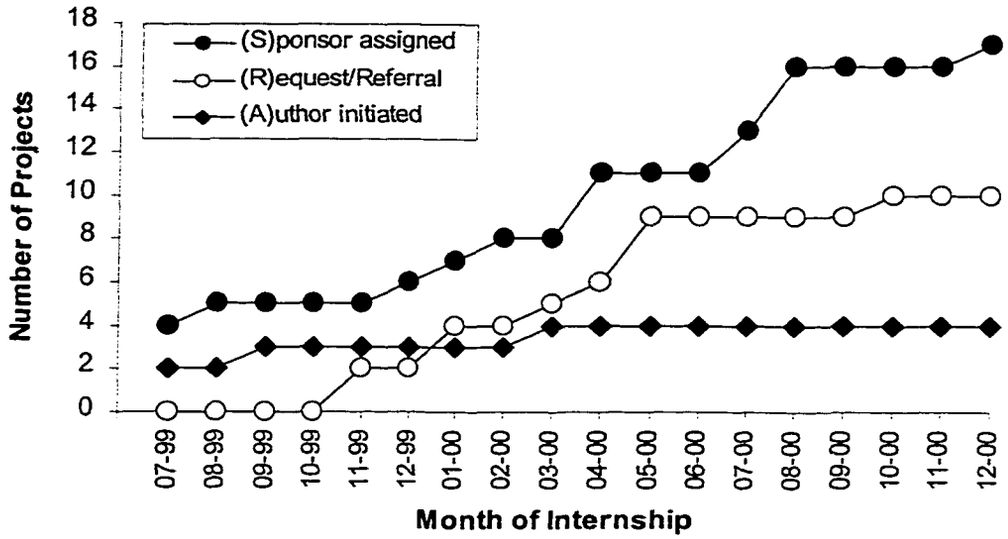

Figure 44. Cumulative Sources of Author's Internship Consulting Projects.

reduced to bimonthly meetings per the author's suggestion. The author met monthly with the Grant Evaluation Team and the Parks Department staff. To expedite project progress, the author formed smaller task forces who prepared material for the monthly meetings. He did so with the Outbreak Response Team and the Parks Department.

Second and Third Generation Projects. The arrows in Figure 45 indicate that nine projects (assigned and requested) developed from previous projects. Seven projects were second generation projects (i.e., resulting from a previous project; shown in dashed lines) and two projects were third generation projects (i.e., resulting from a second generation project; shown in dotted lines).

For example, the first two consultation requests occurred in November 2000. One request was from a CQI Steering Team member who asked the author to work with her and the county's Epidemiologist on streamlining the production of the

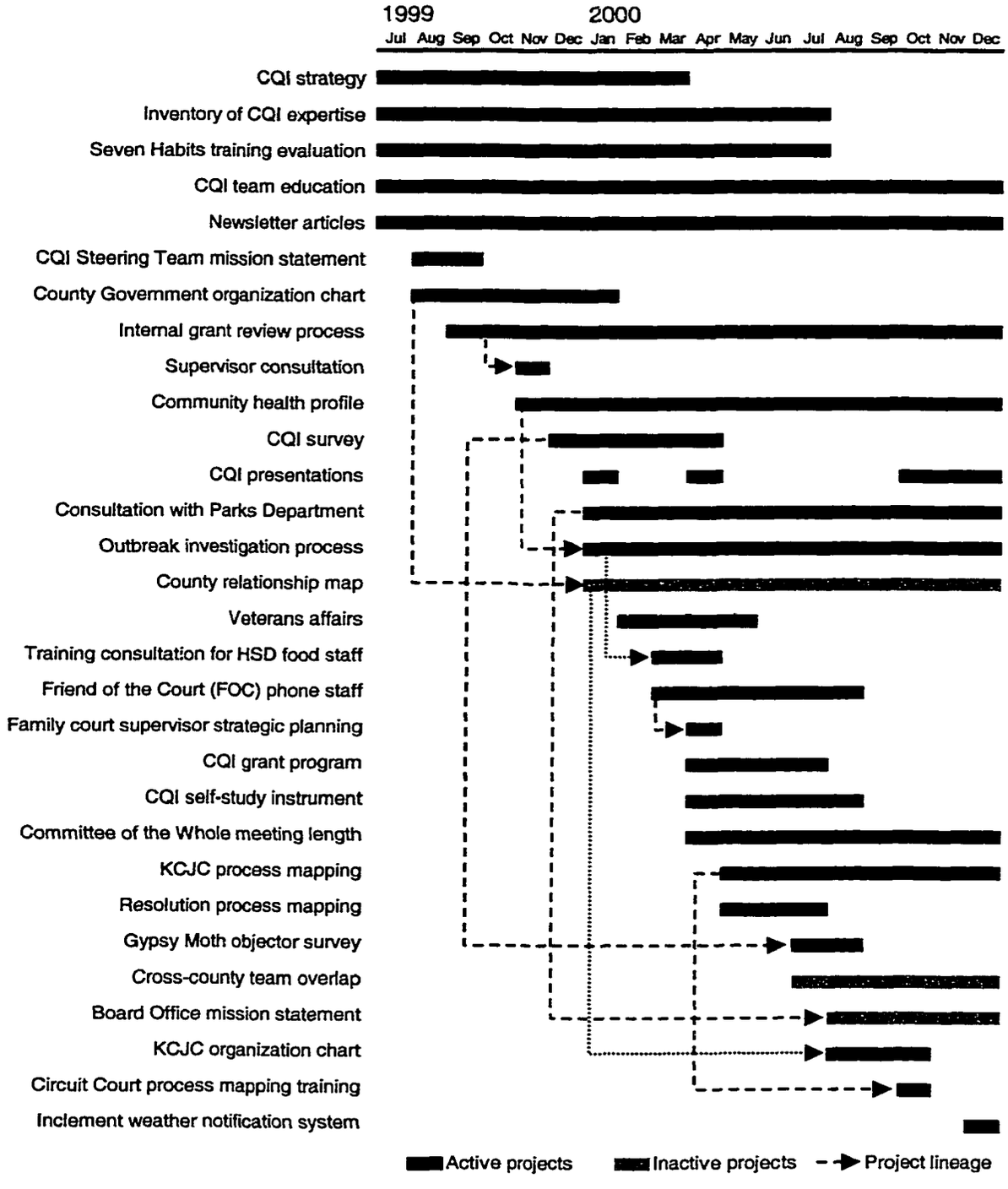

Figure 45. Project Duration and Project Lineage.

Dashed lines = second generation, dotted lines = third generation.

annual Health Profile report. The other second generation project was requested by a member of the Grant Evaluation Steering Team (who was also a member of the CQI Steering Team) after the second process mapping session. The team member asked the author to use process mapping to work with one of her department's supervisor's on improving team processes. (The subsequent consultation meeting revealed that the problem was not likely to be solved through process mapping but, more likely, through team building and improved communication.)

The first third generation project was requested by a member of the Outbreak Response Team. She asked the author to provide suggestions for relevant food inspector training. The author met with her twice to discuss options that as much as possible resembled performance-based instruction (e.g., Brethower & Smalley, 1999). The other third generation project was assigned by the author's sponsor who wanted the author to design an organization chart for the Kalamazoo Criminal Justice Council. This assignment was based on the author's design of the county's organization chart (Figure 13) and his drafts for a county relationship map (e.g., Rummler & Brache, 1995).

Project Penetration. Another dimension related to the evolution of the author's internship projects is their penetration through the organizational system. Figure 46 shows that the author's projects were not located in one or two departments but that they affected all units of county government. Figure 46, which is based on the county's organization chart (Figure 13), shows only direct client relationships.

For example, the author's CQI Steering Team projects affected other departments as well; but are only shown under "CQI Team."

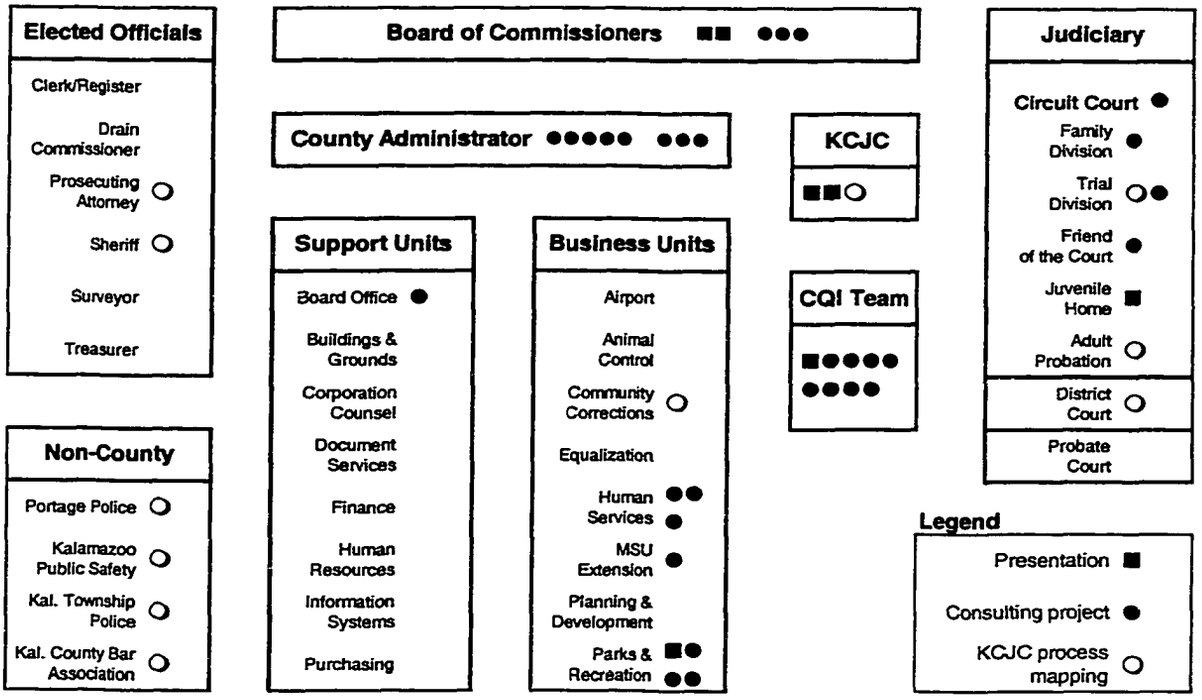

Figure 46. County and Non-County Systems the Author Presented to or Consulted with During his Internship.

The author personally conducted several presentations to the Board of Commissioners, the CQI Steering Team, the KCJC, and two departments (not including the CQI rollout presentations). He conducted consultation projects for the Board of Commissioners, the County Administrator, and for ten departments and teams. The KCJC process mapping project involved nine agencies within and outside county government. Process mapping with representatives from the defense bar is forthcoming, it had been planned in November 2000 after the author reviewed the system map with the president-elect of the Kalamazoo County Bar Association.

Transfer of Technology

Throughout his internship, the author tracked his use of human performance technology tools. He also recorded which HPT tools county staff applied as a result of the author's internship. Table 30 lists, in approximate temporal order of application, HPT tools applied by the author, their references in the performance improvement literature, the clients, and the tools' specific purpose. Table 31 lists HPT applied by county staff prior to January 1, 2001, that did not involve author's participation other than review of some of the products generated with these tools

Table 30

HPT Tools Applied by Author

HPT tool (references)	Client: Purpose of tool
Goal statement job aid (Brethower, 1984; see Appendix F)	CQI Steering Team: Generate team's mission statement and strategic mission statement for county-wide CQI initiative communicated via CQI rollout presentations and brochures Parks Department: Generate mission statement
Behavior engineering model exercise (Dean, 1997b)	CQI Steering Team, department heads and elected officials, and Parks Department: Conduct exercise and show graphs comparing county results to business and industry

Table 30—Continued

HPT tool (references)	Client: Purpose of tool
Behavior engineering model (Binder, 1998; Brethower, 1997; Gilbert 1982, 1996)	CQI Steering Team: Develop Strategic goals for county-wide CQI used for CQI survey and CQI rollout presentations and brochures Outbreak Response Team: Categorize perceived strengths and weaknesses
Total performance system (Brethower, 1972, 1982, 1995)	CQI Steering Team: Educational exercises; "systems thinking" principle of County CQI Board of Commissioners: CQI update, January 4, 2000
Job aids (e.g., Elliott, 1999; Van Tiem et al., 2000)	Newsletter authors: Tips for writing quality improvement success stories (Appendix T) CQI Steering Team: How to set up computer-based CQI presentations using notebook computers and LCD displays
Process mapping (Rummler & Brache, 1995)	Grant Evaluation Team, Outbreak Response Team, Agencies of the Kalamazoo Criminal Justice Council: "Is" and "should" maps Board of Commissioners: Resolution process map Parks Department: Reservation system "is" maps Circuit Court: Process mapping training

Table 30—Continued

HPT tool (references)	Client: Purpose of tool
Product process analysis (Bruno, 1995; Harbour, 1997)	Grant Evaluation Team: Current and proposed process flow; presented at strategic planning retreats (March 2000) and Committee of the Whole (May 16, 2000)
Training impact evaluation matrix (R. O. Brinkerhoff, class material, March 9, 1999)	Seven Habits Evaluation Team: Evaluation exercise
Best-Worst Exercise (D. M. Brethower, class material, January 6, 1998; Appendix EE)	Circuit Court family division administrators and supervisors: Strategic planning meeting
Relationship maps (Rummler & Brache, 1995)	County Administrator: Developed relationship-based organization charts for county government (Figure 13) and the Kalamazoo Criminal Justice Council County Administrator: Develop relationship map for county government (in progress)
Performance logic (Rummler, 1998; Rummler & Wilkins, 1999)	Parks Department: Diagram of "Parks Logic" (Appendix Z)
Performance measurement (Stolovitch & Keeps, 1999a; Van Tiem et al., 2000)	Outbreak Response Team: Tracking form (Appendix Y) to assist in investigation, report writing, and post-investigation team debriefings Community Health Bureau: Time log for tracking hours spent on preparing the annual health profile report

Table 30—Continued

HPT tool (references)	Client: Purpose of tool
Evaluation (Shrock & Geis, 1999; Van Tiem et al., 2000)	CQI Coordinator feedback forms (similar to Appendix C) CQI Steering Team: Senior management surveys (March 2000) and rollout presentation feedback (October 2000, Appendix R) Seven Habits Evaluation Team: Training evaluation via survey and focus groups Parks Department: Assessed acceptance of previous and current mission statements

Planned Application of HPT Tools by County Staff. The author developed two data collection and performance measurement tools that will be applied by staff after January 1, 2001. The grant auditor of the Finance department will use the internal grant review process tracking form to record all non-HSD grant applications and contracts following the January 2001 review of the new grant review process. The author and the HSD grant auditor have been using this form since October 2000. The Outbreak Response Team will use the milestone tracking form to record dates of critical outbreak events. The first application is planned for an outbreak simulation in March or April of 2001, following the completion of the outbreak investigation field guide.

The criminal justice system process mapping will be conducted by agency staff while the author will function as a resource and review draft maps. The

Department of Correction Probation and Parole will process map the post-sentence probation process beginning in January 2001; a first draft was planned for the January 2001 meeting of the KCJC process mapping team.

Table 31

HPT Tools Applied by County Staff Prior to January 1, 2001

HPT tool	Application by staff
Process mapping	Circuit Court administrators trained by the author and their staff are developing process maps for the court's family division operations, such as court order processing Human Resources Department staff developed process maps for salary schedule processing, position processing, and action form processing Parks Department staff completed process map of fairground reservation system
Customer surveys	Clerk/Register and Circuit Court Family and Trial Division installed customer feedback forms based on the OPA survey discussed at CQI Steering Team meetings and provide regular summary reports to management and staff
Goal statement job aid	Director of the Office of Finance developed mission statement based on Brethower's (1984) goal statement job aid to support office's reorganization
Data collection and performance measurement	see section "Data Collection and Measurement Systems" (below)

In addition, several criminal justice agencies will begin to map the misdemeanor case flow. The Assistant Administrator for the District Court, however, requested the author to conduct the mapping sessions because of the complexity of this process.

The transfer of technology occurred through different channels. The author (1) directly recommended use of the tool, (2) explicitly trained the use of the tool, (3) modeled the use of the tool in the course of conducting a project, (4) discussed a tool, and (5) wrote about a tool in the county's newsletter.

Recommendation. One example of the recommended use of an HPT tool was the Finance Director's use of Brethower's (1984) goal statement job aid. In December 2000, the Finance Director told the author that he was planning to develop the first mission statement for his office and asked the author for resources. The author provided the job aid and a list with mission statements generated with this job aid, including the CQI Steering Team's and the Parks Department's mission statement and two mission statements reported in LaFleur and Brethower (1998). On January 11, 2001 the Finance Director presented the author with a draft based on this job aid. On January 12, 2001 the Performance Measurement Team which was developing a strategic planning and performance measurement training manual discussed that mission statement at length. It reads as follows:

> The mission of the Office of Finance is to provide budgeting, accounting, payroll and grants management services to elected officials, active employees, retirees and citizens of Kalamazoo County in a timely and accurate manner so that our customers can consistently and responsively meet their financial management needs. (W. Dundon, personal communication, January 12, 2001)

Training. The use of process mapping by Circuit Court was explicitly trained by the author. Following several process mapping sessions for the Circuit Court, two Circuit Court administrators asked the author to process map family court processes. Due to time constraints (i.e., KCJC process mapping and CQI rollout), the author could not take on this project. After recruiting efforts at the author's university failed, he offered to personally train the administrators in basics of process mapping. During a two-hour training session, the author discussed the prerequisites and materials needed for process mapping and conducted a practice during which the administrators mapped a process with which they both had experience (i.e., scheduling and attending an exam at a physician's office).

Familiarity with the subject matter was an important aspect of the instruction because the administrators were mapping a process in which they were acknowledged experts (unlike the author, who was not familiar with the justice system and thus was able to ask many "What happens next?" and "Why do you do that?" questions). In order to encourage staff participation during process mapping meetings, the court administrators would have to take on the role of facilitator without inadvertently directing or anticipating staff's responses. The author also provided a process map template for transferring the hand-drawn maps to a computer spreadsheet program.

Several weeks later, the author received a draft of the first process maps. This map was very detailed and included direct and indirect process functions. The author requested to be informed of process improvements that may result from this and other process maps.

Modeling. During his work with the Outbreak Response Team and the criminal justice agencies the author modeled the use of process mapping. Based on this modeling and based on the successful application by Circuit Court staff, the KCJC Chair, the KCJC director, and the County Administrator decided that future process mapping should increasingly be conducted by agency staff rather than by the author; the author would remain available as a resource to review draft maps and to suggest data collection methods and opportunities for performance improvement. As mentioned above, the Department of Correction's Probation and Parole staff will be the first criminal justice department to conduct process mapping on their own.

Discussions. Some transfer of technology occurred as a consequence of discussing performance improvement tools. For example, following CQI Steering Team discussions about customer surveys, two team members installed customer survey forms in their department. The author provided samples of surveys used by other departments at that time, such as the Office of the Prosecuting Attorney (OPA). (The OPA customer feedback forms had been developed two years earlier by a consulting intern who pursued his doctorate with the same faculty advisor as the author.) The author's follow-up revealed that these instruments were still in place and that results were communicated regularly (i.e., weekly to monthly) to all staff (personal communication, J. Gregart, December 20, 2000).

Newsletter. In July 2000, the author wrote a newsletter article about the criminal justice system process mapping project; the article included the author's illustration of a sample process map. In October 2000, the newsletter editor who

works for the Human Resources department showed the author several short process maps of the department's critical processes. She reported that she was prompted by the author's article to work with her staff on creating these maps, especially since the accompanying illustration made it look "easy."

Position Description Questionnaire. The author and his sponsor co-developed the position description questionnaire (PDQ) for the full-time CQI Coordinator position (Kalamazoo County, 2000). PDQs are job descriptions used by outside consultants for factoring each position's pay scale. This use of the PDQ may be considered a unique channel of technology transfer because the author used language covering the range of human performance technology in order avoid that the position will emphasize a single aspect of HPT (e.g., only training or only organizational design). The author borrowed from Stolovitch et al. (1997) to develop the position's description.

The final position description questionnaire included the following statements: The purpose of the position is to "assure high levels of human performance related to current and strategic goals of Kalamazoo County Government" (Kalamazoo County, 2000, p. 1). The CQI Coordinator is to train CQI Steering Team members "in human performance improvement [sic] technology (HPT) and tools. . . . [and to] promote HPT as a major approach to achieving desired human performance and create opportunities for promoting HPT within and outside of County Government" (p. 2). The PDQ states the following with respect to measuring accomplishments:

> Appropriate and accurate needs assessments/front-end analysis, including selection of procedures and instruments, are completed. Statements of HPT

> intervention outcomes are written in performance terms which convey intent of the HPT intervention. HPT evaluations are accurate and relevant. Data are analyzed and specifications for revision are generated based on evaluation feedback. Appropriate interpersonal, group process and consulting behaviors are demonstrated. (p. 4)

Data Collection and Performance Measurement Systems

Data collection and performance measurement are possibly the most important dimensions for performance improvement consulting. This section describes some of the obstacles the author encountered to data collection and lists the collection and measurement systems developed by the author and currently installed (or planned to be installed). The section concludes with a description of the author's role in the county-wide performance measurement initiative.

The distinction between data collection and performance measurement systems suggests that they represent two different performance consulting tools. From the author's perspective, a performance measurement system cannot function without data collection, but data collection alone is not performance measurement because it lacks performance standards or goals. Thus, a data collection system is the prerequisite for establishing performance measurement systems.

Obstacles to Data Collection. One characteristic shared by the author's performance improvement projects was that none of his clients had a data collection or performance measurement system in place which the author could have used to readily obtain project-specific baseline data. For example, after three years of conducting the Seven Habits training, the county did not have a system in place to

track participants, neither had it assessed direct and indirect training cost. The Grant Evaluation Team was charged by the Board of Commissioners with streamlining the internal grant review process although no data on its efficiency, or lack of efficiency, existed.

Neither did the projects lend themselves to direct observation of behavior. For example, the Health Profile is produced once a year, and outbreaks are investigated only two to four times per year. For projects with more frequently occurring performances, the author did not have the time to conduct direct observations. For example, the author chose not to monitor calls received by the FOC phone staff; besides this time constraint, listening in on the conversation would have been a violation of confidentiality. As a consequence, the author and his clients collaborated on developing data collection procedures and setting up performance measurement systems.

Data Collection Systems. The Human Resources department continues to track and update database of all county staff who participate in the Seven Habits training. This database is not tracking the performance of the facilitators or the use of the Seven Habits tools. The Friend of the Court phone staff used a data collection log to track wrong calls and angry callers over a five week period. This log was not used after the author's consultation ended.

Performance Measurement Systems. The CQI Steering Team used the CQI survey to collect baseline data on staff's perception of continuous quality improvement with respect to the five BEM-based strategic CQI goals. Future CQI

surveys will be used to draw inferences about the county's perceived improvements along these goals. The HSD grant administrator had been using the internal grant review process tracking form to record grant application and contract status since August 2000. The County's grant auditor will begin using this form beginning January 2001. The Human Services Department's Community Health Bureau staff was using time logs developed by the author for tracking hours spent on preparing the annual health profile report. The completed logs will be used to analyze the types of staff used for the different project elements and for improving the efficiency and reducing the cost of future reports. The author tracked the length of Board of Commissioner's Committee of the Whole meetings and provided regular updates to the County Administrator. Future data will be used to monitor the County Administrator's and Board Chairperson's efforts in keeping the meeting duration below two hours.

Performance Measurement Systems Ready for Implementation. The author developed a performance measurement system for the outbreak investigation process. The system had been reviewed and approved by the Outbreak Response Team prior to December 31, 2000. The first use had been planned for a simulated outbreak investigation simulation during the spring of 2001. The team will use the data collected with this system to monitor, evaluate, and improve their outbreak investigation process.

County-Wide Performance Measurement Initiative. During its 1999 strategic planning sessions the Board of Commissioners considered service evaluation one of

ten high-priority goals for Kalamazoo County Government (Sumek, 1999). The County Administrator created the Service Evaluation Team (now: Performance Measurement Team). In September 1999, the author expressed to the team's chair his interest in working with the team because its charge linked directly to the CQI initiative. The team met for the first time in May 31, 2000. Currently, the author's role is to support the team in developing training tools for county-wide performance measurement and to link it to the CQI initiative for a county-wide performance management system. The team expects to begin a measurement system rollout in mid-2002.

Multiple Baseline-Like Methodology. The temporal distribution of the author's project that involved data collection and performance measurement systems provided Evaluation I with a natural multiple baseline-like methodology. Figure 47 shows how the beginning of the author's projects preceded the design of data collection systems and subsequent data collection for six different projects. The county-wide CQI initiative (January 1999), the evaluation of the internal grant review process (March 1999), and improvements to the outbreak investigation process (November 1999) were started before the author became involved.

Prior to the author's consultation staff had not collected performance data on those projects. For example, the Board of Commissioners charged the Grant Evaluation Team with improving the review process in the absence of objective baseline data, and the Seven Habits training workshops had been conducted for over three years without measuring outcomes other than participant satisfaction. The

author and his clients developed data collection systems and used them to collect baseline data. In the case of the Friend of the Court phone staff project, data showed that the recorded number of wrong calls and angry customers was much below the level reported anecdotally and that further intervention by the author may not add value to the process, especially in light of the ongoing consultant study. It is expected that the other five performance measurement systems shown in Figure 47 will be used to collect follow-up data to evaluate and improve the interventions.

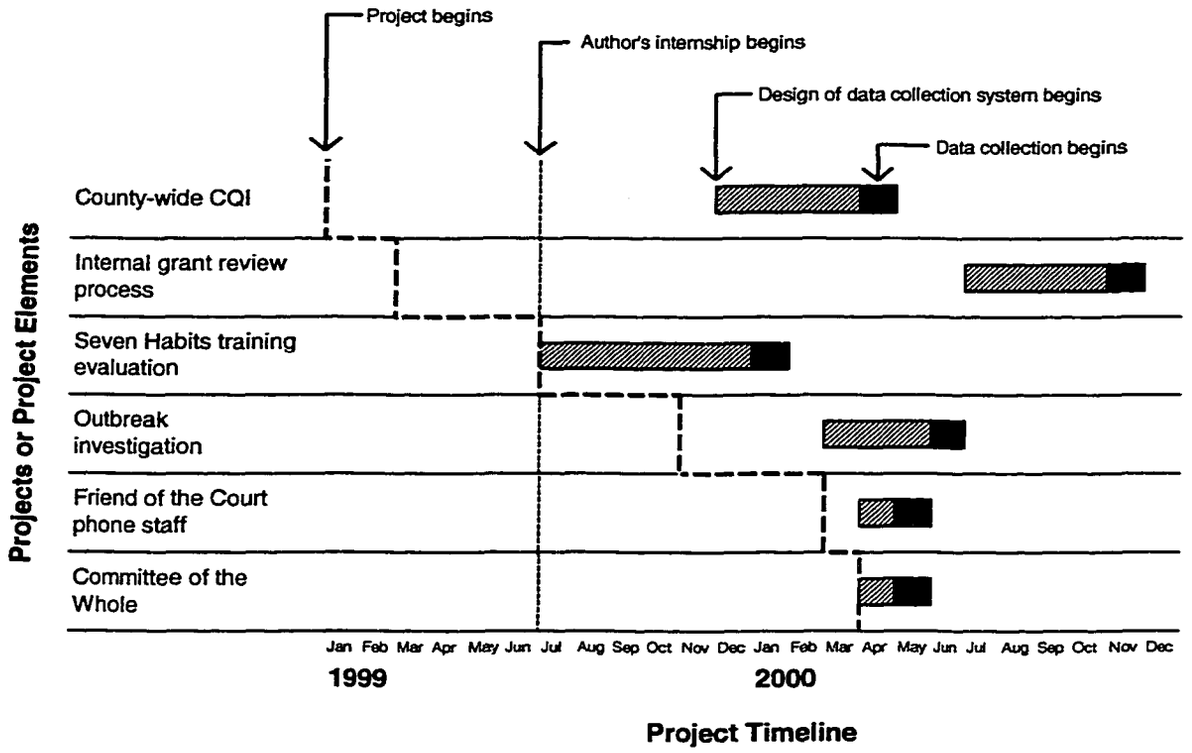

Figure 47. Natural Multiple Baseline-like Methodology for Author's Internship Projects in Order of Project Beginning.

Project beginnings were based on the point in time when county staff initiated those projects.

Results of Evaluation II: Assessing the Utility and Feasibility of the Design of the Progressive Consultative Internship System

This section reports the results of the evaluation of the design of the progressive consultative internship system (PCIS). All six invited evaluators returned completed evaluation checklists and signed consent forms; their ratings and comments are listed in Appendix FF. A description of the results of the summative evaluation is followed by a description of evaluators' ratings for categories that addressed the design's utility and for categories that addressed the design's feasibility. Results for the tools overall category conclude this section.

Summative Evaluation

Evaluators were asked to provide a summative evaluation of the overall quality of the design. Evaluation categories consisted of the three dimensions excellent (i.e., I can recommend implementation without changes), adequate (i.e., I can recommend implementation with minor changes as indicated by my comments), and not adequate (i.e., I cannot recommend implementation without major revisions). Five of the six evaluators rated the design as excellent (83%); faculty evaluator F1 rated the overall design as adequate. None of the evaluators indicated that the design was not adequate.

Computation of Rating Responses

The three evaluation checklists contained 99 items for a total of 198 possible agree, disagree, and can't answer evaluation responses. Sponsor evaluator S1 did not answer item 6, and faculty evaluator F1 did not answer item 31; thus, the six completed evaluation checklists contained a total of 196 scored responses.

With respect to the first nine evaluation categories (excluding the category tools overall), agree responses indicated agreement with the evaluation item and disagree responses indicated disagreement with the design item. Evaluators made a total of 185 responses in these nine evaluation categories.

Percentages of responding were obtained by dividing the number of actual responses per responses option (i.e., agree, disagree, and can't answer) and evaluation category (e.g., purpose, assumptions, goals) by the total number of actual responses and multiplying the result by 100 (Equation 1).

$$\frac{\text{Responses per response option and evaluation category}}{\text{All responses in evaluation category}} \times 100 \qquad (1)$$

Evaluation Results: Utility of the Design

Utility of the design of the progressive consultative internship system was assessed through these categories: purpose, assumptions, goals, and benefits. Table 32 shows agree responses per evaluation category and per user group for these four categories.

Table 32

Agree Responses for Utility Categories

Utility category	Sponsor evaluators	Faculty evaluators	Interns evaluators	Total
Purpose	100%	100%	100%	100%
Assumptions	100%	67%	100%	88%
Goals	100%	100%	100%	100%
Benefits	100%	90%	88%	92%
Total agreements	100%	88%	95%	94%

Sponsor evaluators agreed with all evaluation items. Overall, faculty evaluators agreed with 88% of the evaluation items. They did not agree with the statement "the internship system is consistent with current practices at my university" (item 5) which accounts for the 67% agreement score in the assumptions categories. Faculty evaluator F1 indicated can't answer with respect to the benefits item "the benefits are realistic to HPT/OBM graduate education" (item 9). Intern evaluators agreed with 95% of the evaluation items; the only disagreement was indicated by intern evaluator I1 for the statement that the recommended intern pay of $20 per hours was reasonable (item 10). Overall, evaluators agreed with 94% of the evaluation statements in the four utility categories.

Evaluation Results: Feasibility of the Design

Feasibility of the design of the progressive consultative internship system was assessed through these categories: methods, processes, and tools, planning, selection and recruitment, learning and consulting support, and evaluation. Table 33 shows agree responses per evaluation category and per user group for these five categories.

Table 33

Agree Responses for Feasibility Categories

Feasibility category	Sponsor evaluators	Faculty evaluators	Interns evaluators	Total
Methods, processes, and tools	100%	83%	100%	95%
Planning	92%	88%	100%	92%
Selection and recruitment	83%	63%	100%	83%
Learning and consulting support	100%	100%	100%	100%
Evaluation	100%	88%	100%	96%
Total agreements	96%	83%	100%	93%

Overall, sponsor evaluators agreed with 96% of the evaluation items. Sponsor evaluator S2 indicated can't answer for the planning item "I should be able to obtain Board approval" (item 21) and for the selection and recruitment item regarding intern salary (item 24).

Faculty evaluators agreed with 83% of the evaluation items overall. Faculty evaluator F2 disagreed with the methods, processes, and tools item 14 ("methods are sufficient for implementing and maintaining" the PCIS). Faculty evaluator F1 disagreed with the planning item that the design clearly identifies university resources (item 18) and with the selection and recruitment item that the design clearly describes how to recruit interns (item 20). Both faculty evaluators disagreed with the statement that an independent internship would not be suited for undergraduate students (item 22). Faculty evaluator F2 indicated can't answer with respect to the sufficiency of the biweekly progress meetings (item 27). Intern evaluators agreed with all items in all feasibility categories.

Evaluation Results: Ratings for Tools Overall Category

The evaluation checklist asked evaluators to indicate if tools should be added or removed. For this category, disagree responses indicated agreement with the design in that tools should not be added or deleted. Table 34 shows the distribution of responses for the tools overall category with respect to both adding new tools and removing proposed tools.

Eight of the 11 actual responses (73%) rated the proposed tools as sufficient: five responses (46%) suggested to not remove any tools and three responses (27%) suggested to not add any tools. Intern evaluator I2 was the only evaluator who suggested adding a tool (i.e., transfer of knowledge tool) and removing a tool (i.e.,

relationship management tool). Faculty evaluator F1 did not answer whether to add a tool.

Table 34

Distribution of Responses for Tools Overall Category

Response option	Sponsor evaluators		Faculty evaluators		Interns evaluators		Total	
	Add	Remove	Add	Remove	Add	Remove	Add	Remove
Agree					1	1	1	1
Disagree	2	2		2	1	1	3	5
Can't answer			1				1	
No answer			1				1	

Chapter Summary

This chapter presented the results for Evaluation I (testing the assumption that HTP interns can consult effectively in a county government organization) and Evaluation II (assessing the utility and feasibility of the design of the progressive consultative internship system). Results for Evaluation I consisted of a case study based on the author's performance consulting internship at Kalamazoo County Government. Data collection occurred between July 12, 1999, and 31 December

2000. Results were reported for eight specific projects that exemplified the range of the author's responsibilities, as well as, consulting-related dimensions that spanned across all projects. Results for Evaluation II consisted of subjective evaluation of the internship system design by six evaluators representing the proposed system's three user groups. Evaluators recommended further development and implementation of the progressive consultative internship system.

CHAPTER VI

DISCUSSION

This final chapter discusses the results of the preceding evaluations of the progressive consultative internship system design, their limitations, and their contributions to internship research and to the field of human performance technology. It is argued that that the available evidence supports the assumption that human performance technology interns can successfully consult in county government organizations and that the design of the progressive consultative internship system (PCIS) is both useful and feasible.

Discussion of Evaluation I Results: Testing the Assumption that HPT Interns Can Consult Effectively in a County Government Organization

Chapter IV proposed internal and external standards for judging the author's effectiveness as performance consulting intern to county government (Table 19). Internal standards were related to the merit of the consulting process; external standards were related to the perceived value of the author's consulting for the sponsoring organization.

Internal Standards: Merit of Consulting Process

Internal standards regarding the quality of the author's consulting process consisted of five elements: (1) Did the author apply HPT tools with a proven track record?, (2) Did the author demonstrate transfer of HPT?, (3) If no performance measurement system was in place, did the author install such a system?, (4) Did the author collect baseline and follow-up data?, and (5) Did the author demonstrate performance improvement?

HPT Tools with a Proven Track Record

The author used a number of HPT tools to support his consulting efforts (Table 30). Several of these tools have a published track record as supporting performance consulting efforts. Table 35 provides examples of this track record for six different tools. The internship at Kalamazoo County Government was the author's first opportunity to apply these tools in a real-world organization. Establishing this connection between theory and practice is considered the paramount goal of any internship (e.g., Sweitzer & King, 1999; Task Force, 1992).

Transfer of Human Performance Technology

The author also had the opportunity to introduce county staff to human performance technology through presentations, reports, and actual application. As a consequence of this introduction, staff began to use several HPT tools to begin their own performance improvement projects (Table 31).

Table 35

Published Track Record of HPT Tools Used by the Author

HPT tool	Purpose	Reference
Goal statement job aid	Support marriage and small business	LaFleur and Brethower (1998)
	Support performance and communication	Smalley, Inman, and DeJong (1995)
Behavior engineering model	Create design specifications for a virtual office	Austin and Garnier (1998)
	Improve human performance support systems	Binder (1998)
	Conduct thorough yet rapid performance analysis	Brethower (1997)
	Exercise showing training as one solution of many	Dean (1997b)
Total performance system	Improve performance of supplier organization and its customers	LaFleur and Brethower (1998)
Job aids	Design and evaluate performance-based instruction	Brethower and Smalley (1998)
	Develop performance contracts	Fritz (1993)
	Guide performance in real time	Harless (1986)
	Troubleshoot performance	Mager and Pipe (1997)

Table 35—Continued

HPT tool	Purpose	Reference
Process map	Increase suppliers' and manufacturer's conformance to specifications	Dembeck (1998)
	Reduce product development cycle	Johann and Patterson (1998)
Relationship map	Communicate professional organization as a system	Balanced Score Card Task Force (1998)
	View processing system's effects on other processing subsystems	Dembeck (1998)
	View entire retail chain as a performance system	Panza (1998)

Performance Measurement Systems

Without exception, none of the author's projects involved extant data collection or performance measurement systems. As a consequence, the author and his clients developed these systems, including the CQI survey, CQI rollout presentation feedback forms, and data collection forms for the outbreak investigation process, the internal grant review process, and the health profile production process. The Seven Habits evaluation project involved the creation of a participant database, a participant survey, and two focus groups. Post-intervention data collected for the

internal grant review process were used by the author's clients to improve the recently redesigned review procedures.

Baseline and Follow-up Data

The author emphasized data collection whenever possible. Most data were baseline data against which to measure future improvement; data collected for the internal grant review process and the Parks Department mission also included post-intervention data.

Quantitative baseline data were collected for the outbreak investigation process and the Committee of the Whole meeting length project. Data collected for the Friend of the Court phone staff project regarding wrong calls and angry customers were part of the author's front-end analysis.

Qualitative baseline data were collected for the Seven Habits training program and the CQI initiative. CQI baseline data included the first county-wide survey on the perceived state of organizational performance support, social validation of the initiative by senior management, and rollout presentation feedback from over 300 county employees and elected officials. Data collection efforts also included anecdotal reports (i.e., Parks Department meeting length).

Performance Improvement Demonstrated

Performance improvement for the internal grant review process was shown in the reduction of process steps and overall review cycle time. Baseline data suggested

a potential reduction of grant-application related Board agenda items in the order of 40 to 45%. Data reported on the acceptance of the Parks Department's mission statement were not performance improvement data per se; they did reflect, however, that the author's intervention (i.e., a new mission statement) improved one element of the Parks Department's performance support system.

Conclusion: Internal Standards

The available evidence supports the conclusion that the author demonstrated consulting processes that met the proposed internal standards for determining the merit of his consulting efforts. It was shown that the application of human performance technology supported the installation of performance measurement systems and subsequent data collection in a number of settings and formats.

External Standards: Value of Consulting

External standards regarding the value of the author's consulting consisted of four elements: (1) Did the author receive consulting requests or referrals?, (2) Were requests frequent enough to require prioritizing of projects?, (3) Did requests address meaningful performance gaps?, and (4) What type of feedback did the author receive from his clients?

Consulting Requests or Referrals

Ten of the author's 31 projects originated from client requests; this number does not include projects conducted for the CQI Steering Team (those projects were considered assignments). The first requests were made in November 1999, the fifth month of the author's internship. This time lag suggests that it was necessary for the author to demonstrate that his consulting provided some value to his clients (e.g., process mapping the internal grant review process) before county staff accepted the consulting intern as an effective resource.

Prioritization of Projects

The frequency of consulting requests affected the author's consulting efforts in three ways. First, nine months into the internship sponsor assignments and client requests required the author to refrain from volunteering his services. Second, requested projects took precedence over assigned projects. Per the author's request, the County Administrators put the following three projects on hold: the county organization relationship map, the Board Office mission statement, and the team overlap project (Appendix E). In addition, the criminal justice system process mapping project necessitated the author's absence from all 28 CQI rollout presentations. Finally, the author did not have the time to map case flow processes in the Circuit Court's family division. The author attempted to recruit other HPT graduate students; when this effort failed, he trained two court administrators on basic process mapping skills.

Meaningful Performance Gaps

Performance gaps were considered meaningful when they required large amounts of the county's resources or when they affected employee and citizen safety. Progress toward closing these gaps was expected to improve both service delivery and citizens' quality of life. Projects that may be considered meaningful included the county-wide CQI initiative with its potential impact to improve intra- and interdepartmental processes, the outbreak response investigation with its potential to prevent food-poisoning, and the development of a county-wide performance measurement system and its potential to improve service delivery effectiveness and efficiency in conjunction with the CQI initiative. The criminal justice process mapping project was meaningful because it supported the county board's "top goal" for 2000 (Haroldson, 2000, p. A2) and because of its potential contribution to reducing jail overcrowding. The announcement that the process mapping resulted in the "first-ever map of a felony case through the entire system done in the country" (Allison, 2001b, p. A4) contributed a positive element to the media's coverage of the county's criminal justice system study and its implementation (Appendix GG).

Client Feedback

Client feedback occurred in a number of formats and was generally supportive of the author's consulting efforts. It also included negative comments and suggestions for improvement.

Conclusion: External Standards

The available evidence supports the conclusion that county staff perceived the author's consulting as valuable. The author received requests for meaningful projects that required prioritization of consulting projects. Client feedback was by and large positive and supportive.

Possible Limitations of Evaluation I

The results of Evaluation I have to be considered in light of the fact that it was conducted as a single-subject case study without experimental manipulation of dependent variables. Limitations of this study included threats to its internal and external validity. It is suggested that the multiple baseline-like nature of the case study attenuated the possible effects of these limitations.

Threats to Internal Validity

Internal validity refers to the extent to which an intervention, rather than extraneous variables, accounts for the observed outcomes (e.g., Kazdin, 1998). The question to be addressed with respect to Evaluation I is whether the author's consulting efforts account for the reported results or whether county staff could have, and would have, achieved similar outcomes in the absence of a consulting internship. Specific threats to internal validity consisted of the absence of a rigorous experimental methodology and the resulting absence of a experimental control.

Lack of Experimental Methodology. The multiple baseline-like arrangement of projects that involved data collection (Figure 47) was of serendipitous nature; it did not involve deliberate design and execution of carefully selected projects. Instead, the real-world setting required the author to conduct projects as they were assigned or requested. As a consequence of the absence of an experimental methodology the study also lacked experimental control.

Lack of Experimental Control. Although individual projects may have been successful in developing performance measurement and performance support systems, the lack of experimental control is evident in the fact that the author relied primarily on staff reports to determine possible interventions. That is, with the exception of the Friend of the Court phone staff project, the author failed to collect data to ascertain the magnitude of the reported performance problem. For example, the author accepted his clients' words that the internal grant review process should be improved and that the outbreak response investigation process was not efficient.

It may be argued, however, that the multiple baseline-like character of the author's internship strengthened the case study's findings. Many published reports of performance improvement interventions consist of case studies with a single project (e.g., Esque & Patterson, 1998; Lefevre, 1992; O'Brien, Dickinson, & Rosow, 1982). The present case study contained multiple projects whose outcomes suggest the author's internship moved existing projects forward and prompted additional performance improvement projects. For example, the County Administrator did not introduce the county-wide CQI initiative until after the Board approved the author's

internship; similarly, the Seven Habits training evaluation was only begun after the author's internship commenced. Furthermore, the number of consultation requests suggests that the author's internship functioned as a catalyst for conducting several other performance improvement projects, including the community health profile project, the outbreak investigation project, and the various Parks Department projects, and doing so in a manner that expedited some of these projects. Finally, the author's emphasis on data collection prompted the installation of various data collection and performance measurement systems. Together these aspects of the author's internship may have contributed to strengthening the present case study approach and, possibly, attenuated the effects of insufficient experimental rigor and control.

Threats to External Validity

External validity refers to the extent to which the results of an intervention can be generalized to other populations, settings, and conditions (e.g., Kazdin, 1998). Threats to external validity included the degree to which sponsor and faculty advisor encouraged independent consulting and the author's consulting repertoire.

Independent Consulting. The author was afforded substantial freedom in conducting his projects. His sponsor supported the author's projects without exception, provided support and assistance when requested, and generally promoted CQI to the entire organization. The author's faculty advisor, too, encouraged independent consulting. This degree of independence may not be characteristic of other consulting internships; the design of the proposed internship system, however,

encourages sponsor and faculty advisor to provide interns with as much autonomy as possible.

Author's Consulting Repertoire. The author's technical and personal communication skills may be different from the skills of other graduate students who may conduct a consultative internship. Other consulting interns may have different strengths and weaknesses and, thus, may or may not be able to generate similar consulting outcomes, or they may do so more or less expeditiously.

Conclusions for Evaluation I

The available evidence supports the conclusion that the author provided effective performance consulting during his internship at Kalamazoo County Government. Consulting projects ranged from strategic planning and designing surveys to implementing performance measurement systems. Client feedback indicated that the author's consultation was perceived as valuable. The case study format does not allow conclusions regarding the causal effect of the internship projects on organizational performance improvement. In addition, the author's internship was not conducted as a PCIS internship; rather it was an unstructured individual consultative internship. Generalizations about the effectiveness of other graduate students as consulting interns in county governments or of the effectiveness of the PCIS have to be couched in terms of these limitations. Future research is needed to assess the effectiveness of the progressive consultative internship system using different sponsors, faculty advisors, and interns.

Discussion of Evaluation II Results: Assessing the Utility and Feasibility of the Design of the Progressive Consultative Internship System

The purpose of evaluating the design of the progressive consultative internship system was to determine its strengths and weaknesses and to recommend possible improvements. Evaluators' ratings, summative judgments, and optional comments suggested that the design of the progressive consultative internship system was both useful and feasible. Before exploring possible improvements and proceeding with development and implementation of the PCIS the limitations of the method that generated the evaluation data should be addressed.

Possible Limitations of Evaluation II

The expertise-based evaluation method used to generate qualitative data about the proposed internship system design may have been subject to the following limitations listed in Table 21: (1) replicability, (2) personal bias, (3) open to conflict of interest, (4) superficial look at context, and (5) overuse of intuition (Worthen et al., 1997).

Replicability

The author selected evaluators based on his perception of their expertise in one or more areas relevant to the PCIS. This familiarity raises concerns about the internal validity of Evaluation II because it may have yielded evaluation data that are not replicable. That is, a different set of experts, evaluating the same design

document, might have made different judgments and recommendations. One example of this limitation is the wide range of recommendations a journal manuscript may receive from different reviewers. The author attempted to limit the impact of this weakness by convening a panel of evaluators with technical expertise in several areas of the proposed internship system (i.e., county government, internships, and human performance technology) rather than selecting evaluators with expertise in only one area relevant to the internship design.

Personal Bias

It is possible that evaluators provided a more (or less) favorable evaluation because they were acquainted with the author. These individuals, however, were highly-educated professionals who were asked to set their personal bias aside and to render an objective professional judgment. This acquaintance, on the other hand, may have prompted evaluators to be more thorough in their review of the design than it might have been the case if the evaluators would not have known the author.

Open to Conflict of Interest

None of the evaluators supervised the author or were collaborating with the author on this or other projects. It is suggested, therefore, that the potential for conflict of interest was minimal.

Superficial Look at Context

The fact that the design and its evaluation were part of the author's dissertation project may have encouraged evaluators to provide more (or less) favorable ratings than if the project were conducted with a different purpose (e.g., a term paper). The author had no direct control over each evaluator's review behavior but attempted to exert antecedent stimulus control by stating in the evaluation packet that the outcome of the evaluator's rating had no bearing on the dissertation and by requesting reviewers to render an objective professional judgment.

Overuse of Intuition

The proposed internship system presented a novel approach to internships. Therefore, it was necessary for evaluators to rely on their past history with internships and performance consulting in similar settings in order to judge the various evaluation items. The use of intuition would have been entirely inappropriate, however, were the object of this evaluation an implemented internship system that could yield objective performance data.

These arguments regarding the limitations of the utilized evaluation method do not suggest that the present evaluation procedure was free of all forms of validity concerns. The degree of impact of these limitations on the evaluation outcome cannot be ascertained; however, it is not considered substantial enough to invalidate the present findings.

Improving the Design of the Progressive Consultative Internship System

Although the overall evaluation of the internship system design indicated that it was mature enough for further development and implementation, several of the evaluators' comments indicated potential areas for improving the design of the progressive consultative internship system. The author recommends to add information to the responsibilities worksheets for all users and to add the faculty advisor as a party to the internship contract.

Sponsor Responsibilities Worksheet

The sponsor responsibilities worksheet should include the recommendation that the sponsor seek approval from the Board of Commissioners even if it will not be required by a county's statutes. This recommendation would prompt sponsors to consider communicating with Commissioners in regards to a departmental or organization-wide performance improvement program. Sponsors could describe the current state of performance improvement in their organization and outline potential benefits of a progressive consultative internship system. Commissioner support may be requested informally or by way of a resolution that includes the creation of an internship position. This dialogue could have the possible benefit of generating elected officials' support of an organizational performance improvement program; this may be particularly desirable for sponsoring organizations without a formal performance improvement plan.

Faculty Advisor Responsibilities Worksheet

The faculty advisor responsibilities worksheet should include the recommendation to involve undergraduate students in the internship system. Undergraduates may function as intern assistants for a specified amount of hours or on a project basis; they may collect data, computerize process maps, or take and distribute minutes. The faculty advisor should work with the sponsor in setting up a pay system for undergraduate students. The sponsor may opt to pay undergraduates directly or via a university-approved assistantship. The faculty advisor will also be prompted to explore the possibility of academic credit in lieu of remuneration.

Intern Responsibilities Worksheet

Using undergraduate students as a possible resource for the proposed internship system requires additional responsibilities from graduate interns. These responsibilities include interviewing and selecting undergraduate assistants, providing them with regular feedback, and writing letters of recommendation if requested. Graduate interns should also be responsible for selecting suitable projects for their assistants. These responsibilities will provide graduate interns with the opportunity to acquire supervisory skills.

Internship Contract

The internship contract should include the faculty advisor's role and require the faculty advisor's signature. In addition, the contract should state specifically that

interns will be paid for meetings with the sponsor and for conducting relevant research (e.g., conducting literature reviews and attending conferences).

This contract will be the internship system's only explicit contingency management tool for both sponsor and faculty advisor. On a more regular basis, interns will prompt biweekly meetings and request additional feedback. The system's design implies that the contingencies of reinforcement for all users' behavior will consist of signs of performance improvement, such as consulting deliverables, client feedback, and data showing performance improvement. The occurrence of these events, documented through the various evaluation tools, will, most likely, maintain the behavior of sponsor and faculty advisor across internships. The lack of signs of progress, however, may prompt a sponsor or faculty advisor to discontinue the system, possibly after a single internship.

Developing and Implementing the Progressive Consultative Internship System

Before the internship system can be implemented, its tools must be developed into usable and user-friendly job aids and checklists. The developed tools should be evaluated again. After necessary improvements have been made, the internship system can then be tested in a real-world setting. This first implementation would provide pilot data that can be used to further improve the system's processes and tools. Based on evaluators' comments, a pilot implementation should also track the adequacy of biweekly progress meetings and determine if a pool of available interns exists for the geographic area in which the pilot will be conducted.

Making final adjustments to the internship system may then result in a collection of tools (i.e., a manual) that can be introduced to potential users in county government and in universities with graduate programs in human performance technology, organizational behavior management, or related fields. This would require a proactive effort on part of the system's developer or, possibly, previous evaluators and users of the pilot implementation as they introduce this system to their colleagues.

Future Research

Future research is needed to evaluate the maintenance of performance improvement interventions implemented by consulting interns and the maintenance of any transfer of technology (long-term follow-up was not part of the present project). Research should also be conducted to assess the effectiveness of progressive consultative internship systems across county government organizations and whether internships can be connected so they generate progressive learning resources for interns and progressive performance improvement for the sponsoring organization.

Potential users may decide to implement the PCIS based on pilot data alone; long-term follow up data could then be collected from multiple sites. This parallel effort of implementing the PCIS and collecting long-term outcome data may enable interns to both conduct consultative internships and, at the same time, participate in a multi-organizational research project. Data collection systems for collecting efficacy data will be in place because they are an integral part of the progressive consultative

internship system. Data analysis may be conducted by the system's developer, possibly in collaboration with additional evaluators.

Contribution to Knowledge

The present study was based on current internship and HPT consulting literatures. The following discussion suggests that this project contributed to the internship literature in two ways. First, a combination of quantitative-qualitative evaluation methodologies was used to assess the effectiveness of intern consulting across a number of consulting projects, and second, it introduced the design of a novel internship system. The study's contribution to the field of human performance technology consisted of the application of the behavior engineering model as an organizational strategic planning tool in the public sector, the use of the goal statement job aid in the public sector, and the application of process mapping for interagency processes.

Contribution to Internship Research

Current internship research uses both quantitative and qualitative research tools to assess interns' learning, interns' career success, and internship benefits to sponsoring organizations. Qualitative research methods include questionnaires (e.g., Taylor, 1992), ratings (e.g., Andrews et al, 1996; Taylor, 1992; Weigand, et al., 1999), and archival subjective data (e.g., Gabris & Mitchell, 1992). Quantitative

research methods include cost-benefit analyses (e.g., Greenberg et al., 1998; Schauble et al., 1989).

Quantitative and Qualitative Assessment of Consulting Internship Outcomes

Missing from this list of evaluation methods is the quantitative assessment of the effectiveness of performance consulting interns. The only study that assessed a consultative internship used qualitative data only: Weigand and his colleagues (1999) assessed the consulting intern's value to the client (i.e., collegiate basketball team) but did not assess the outcome of this consulting on the team's subsequent performance.

The present study assessed not only the perceived value of the author's internship to the sponsoring organization, it also reported quantitative outcome data with respect to organizational performance improvement. The attempt to collect objective data reflects the emphasis of the field of human performance technology to provide verifiable evidence of consulting outcomes.

Progressive Consultative Internship System

Most internship research focuses on internship programs in which interns conduct similar projects in individual internships isolated from previous and subsequent interns (e.g., Murphy, 1973b; Pierson, 1992; Sweitzer & King, 1999). The present study introduced the concept of an internship program as a system that connects individual internships into a long-term progressive learning and consulting

system in which interns balance multiple assignments for multiple clients. The qualitative evaluation of its design suggested that such a system could be both useful and feasible.

Contribution to the Field of Human Performance Technology

The present study focused on performance consulting internships in county government. It is suggested that the author applied well-established HPT tools to a new set of problems and that public sector internships may provide future HPT practitioners with a viable learning experience.

New Use for HPT Tools

Brethower (1995) argues that practitioners do not need a large arsenal of specific tools to add value to specific aspects of human performance. Instead, experts should use a few tools for a wide range of problems in a wide range of settings. The present project provided information about the application of human performance technology in the public sector to a set of problems not reported before in the HPT literature. These tools were the behavior engineering model (Gilbert, 1982, 1996), the goal statement job aid (Brethower, 1984), and process mapping (e.g., Rummler & Brache, 1995).

Behavior Engineering Model as Strategic Planning Tool. Many applications of the behavior engineering model (BEM) (Gilbert 1982, 1996) focused primarily on troubleshooting and designing human performance systems (e.g., Austin & Garnier,

1998; Binder, 1998; Brethower, 1997; Dean, 1997b). In the present study, the behavior engineering model was used as a strategic planning tool. The author and the CQI Steering Team used the BEM as a foundation for Kalamazoo County's strategic performance improvement goals. It was beyond the scope of the present study to assess the long-term impact of the strategic plan on the county's performance; however, evidence in the form of internal surveys and external recognition was presented that socially validated these goals with respect to achieving the county's mission and goals and improving its customer service.

Goal Statement Job Aid for Public Sector Performance Systems. Brethower's goal statement job aid (Brethower, 1984) has been shown to support the development of organizational mission statements in the private sector (e.g., LaFleur & Brethower, 1998; Smalley et al., 1995). The author used this tool to generate mission statements for several different county government performance systems (i.e., the CQI Steering Team, the county-wide CQI strategy, and the Parks Department). The goal statement job aid was also used by the Director of Finance to generate his department's first mission statement.

Process Mapping Interagency Processes. The criminal justice system process mapping project illustrated how process mapping can be used not only for intraorganizational processes (e.g., Dembeck, 1998; Johann & Patterson, 1998; Malott & Varnell, 1998; Panza, 1998) but for interorganizational processes as well. The interorganizational system map depicting the flow of a felony case through

Kalamazoo County's justice system has been recognized to be the first such criminal justice system map in the United States.

These applications to a county government organization demonstrate that tools enabling systems thinking (e.g., Brethower & Dams, 1999; Senge, 1994) may be used in any setting regardless of the system's products and services. However, further data are needed to determine the effectiveness of these tools in the public sector with respect to initial performance improvement gains and long-term maintenance.

HPT Internships

Results from the author's internship suggest that consultative internships in county government may be a viable option to provide future HPT practitioners with public sector experience. After graduation, interns may join private consulting firms or become internal consultants for public sector organizations. Either way, they will be well-prepared to apply human performance technology in large public or private sector organizations.

Summary and Conclusion

The present study synthesized internship, consulting, and human performance technology literatures into the progressive consultative internship system. A behavioral systems analysis framework guided the design of the system's program logic, and both the behavior engineering model and the total performance system

were valuable tools for developing the system's methods, processes, and tools. The two evaluations utilized quantitative and qualitative methodologies to assess the design's assumption that interns can be effective performance consultants to county government and to determine if the design was both practical and feasible.

The available evidence supports the conclusion that it is possible for HPT interns to consult effectively in a county government organization. However, the case study showed that preconditions for successful consulting internships may extend beyond providing tools and a structured internship system. Preconditions in the present study included personal qualifications and the intern's emphasis on relationship building. Students not effective in these areas may run risks of not becoming successful performance consulting interns.

The evaluation of the internship system's design indicated that the progressive consultative internship system is both useful and feasible and that further development and subsequent implementation are warranted. Any implementation of the proposed internship system at one or possibly more county government organizations should be considered a pilot until long-term data about the system's efficacy can be obtained.

Appendix A

Letter of Recommendation for Consulting Intern at the Office of the Prosecuting Attorney, Kalamazoo County Government

James J. Gregart
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227 W. Michigan Avenue
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February 20, 1998

To Whom It May Concern:

Re: Timothy V. Nolan

For the past two years, Mr. Timothy V. Nolan has been a management consultant to my organization. His original mission was to take a rigid, highly structured, governmental lawfirm of 30 egotistical trial attorneys plus 40 support staff ..... and see what he could do.

Today, and two years later, I'm pleased to confirm and attest to Mr. Nolan having done "one hell of a job" in revolutionizing and transforming my office and colleagues. As I look back, I'm utterly amazed at how far he's helped us come ..... and how different we were .... a mere 24 months ago.

Now, I definitely don't want to raise Mr. Nolan to the level of some fanatical religious management guru/consultant. But, ... I do want to credit him with having guided us through some very "rough waters" of "organizational change" .... and with earning the personal confidence and respect of everyone during the arduous journey.

Mr. Nolan provided the necessary professional expertise and calming influence to help my office envision an improved future .... and find a pathway toward it. I cannot overstate the importance of his contribution to our growth and momentum. Tim Nolan immeasurably and dramatically helped change and improve our systems .... and the folks who work here.

Tim is an exceptionally bright, intelligent and hard-working person. However superb those attributes, they don't define his best quality. Where Timothy V. Nolan excels exceptionally is in the important area of interpersonal skills, relationships and common-sense. It's been Tim Nolan "the person" .... not the "management consultant" .... who's made things happen in this Prosecutor's Office.

For sure, Tim has the cranial capacity and cognitive reasoning skills to be labeled "smart". But, "smart" alone doesn't make it in today's world. You need more .... and Nolan has that rare additional quality. When you first meet Tim ... you like him. Because you like him, you begin listening to him. When you listen to Tim, you begin to change a little. When you begin to change a little, ... you begin to improve.

For two years, I've watched Tim interact with a wide variety of people with a myriad of personal abilities, fears, and agendas. Without exception, Tim has earned their respect, confidence and support. As my office has marched into a dark fearful swamp known as "organizational change", it's been Tim Nolan who walked with us. He didn't lead us .... but he stayed close at our side the for past two years. He gave us direction, counsel, encouragement and his very best effort. We could not have asked nor received more or better from anyone else.

After two years of Nolan literally "living" with us, my organization is a better place. My systems, policies and procedures are vastly improved. The culture of our lawfirm has changed for the better. This is a nicer place to work than two years ago. My colleagues, ... from the receptionist to myself .... all interact differently and more effectively.

I don't want to go on forever bestowing accolades and laurel wreaths on Tim Nolan, so let me close by simply indicating that he's what some people call a "winner". I've only been a lawfirm CEO for 25+ years, but in my limited experience, Timothy V. Nolan "has what it takes" to succeed; both professionally and personally. His future is limitless and his commitment to excellence boundless. He's made a difference for me and my organization. I'm pleased and proud to have been associated with him for these past two short years.

Very truly yours,

James J. Grepart
Prosecuting Attorney

Appendix B

Client Interview Guide
(Brethower, 1987)

Client Interview Guide

What is your name and job title or role?	Name	What is the name of your department?
What do you do to perform your job or role?	Process	What does the department do?
What are your major products / accomplishments / results?	Output	What are the department's goods or services?
What personal or professional goals do you achieve in your work?	Policy & Mission	What is the department good for? What are its goals and standards?
Who are your customers? (Internal / External)	Customer	Who are the department's customers? (Internal / External)
How do your customers benefit from what you do?	Cultural Goals	How do the customers benefit from what your department does?
How does the department benefit from what you do?	Philo-sophical Ideals	How does the County's economy, society, and physical environment benefit from what your department does?

Appendix C

Client Feedback Forms

Meeting Feedback

A key ingredient of continuous quality improvement is the measurement of the performance of individuals, programs, teams, and departments. These data are important to see what works well and what can be improved.

Your honest feedback is important for me to determine if this meeting was helpful to you and how I could be more helpful in the future.

I feel that this meeting added value I agree I disagree

This meeting added value / did not add value because:

_____

_____

_____

_____

What could I do to make these meetings more valuable in the future?

_____

_____

_____

_____

Project Completion Feedback

A key ingredient of continuous quality improvement is the measurement of the performance of individuals, programs, teams, and departments. These data are important to see what works well and what can be improved.

Your honest feedback is important for me to determine whether I was helpful to you and how I could be more helpful in the future.

The process consulting added value	I agree	I disagree
The project was completed faster	I agree	I disagree
The quality of the project improved	I agree	I disagree
Performance measures were in place before	I agree	I disagree
Performance measures are in place now	I agree	I disagree

What could I do to make my consulting more valuable in the future?

_____

_____

_____

_____

Appendix D

Approval from Author's Sponsor to Conduct Present Research Project on the Premises of Kalamazoo County Government

KALAMAZOO COUNTY GOVERNMENT

Randolph D. Terronez, County Administrator

201 WEST KALAMAZOO AVENUE • KALAMAZOO, MICHIGAN 49007
PHONE (616) 384-8089 FAX (616) 384-8032

October 15, 1999

Ms. Loreene Broker
Human Subject Institutional Review Board
Western Michigan University
Kalamazoo, MI 49008

Dear Ms. Broker:

Herewith, I approve that Professor Dale Brethower and Peter Dams may conduct the following research project on the premises of Kalamazoo County Government: "A Systems Approach to Developing an Internship Model that Benefits the Interning Organization."

Sincerely,

Randolph D. Terronez
County Administrator

Appendix E

Complete Listing of Author's Internship Projects at Kalamazoo County Government in Order of Project Begin

(S) Sponsor-assigned
(A) Author-suggested
(R) Requested by county staff

Project	Description	Start	End	Deliverable(s)
1. CQI strategy (S)	Assist CQI Steering Team in developing and communicating the strategy for county-wide quality improvement	July 1999	March 2000	Strategic mission, goals, and objectives
2. Inventory of CQI expertise (S)	Determine all departments' past and current quality improvement efforts	July 1999	July 2000	Inventory of internal CQI expertise
3. Seven Habits training evaluation (S)	Assess the effect of the county's Seven Habits training program	July 1999	July 2000	Cost assessment, survey, focus group results, report to county board (10/00)
4. CQI team education (S)	Bring all team members up to date on quality improvement	July 1999	Ongoing	CQI basics, sensationals and how-abouts, BEM exercise, TPS exercise, systems thinking presentation
5. Newsletter Articles (A)	Provide CQI articles for the county employee newsletter	July 1999	Ongoing	Articles since 9/99; with various authors; article-writing job aid
6. CQI team mission statement (A)	Assist the CQI Steering Team in developing the team's mission statement	August 1999	September 1999	Mission statement; foundation for County CQI mission
7. County government organization chart (S)	Develop new organization chart to replace existing	August 1999	January 7, 2000 (with later updates)	Org chart reviewed by all officials; on county web site
8. Internal grant review process (A)	Assist grant evaluation team in revising policy and procedures for internal review of external grant applications	September 1999	July 2000	Revised policy and procedures adopted by county board, July 2000; effective September 1, 2000
9. Supervisor consultation (R)	Initial request for process mapping ineffective team processes	November 1999	November 1999	Recommended conflict resolution process

(S) Sponsor-assigned
(A) Author-suggested
(R) Requested by county staff

Project	Description	Start	End	Deliverable(s)
10. Community health profile (R)	Develop process improvement system for production of county's health status report	November 1999	Ongoing	Process map, task list with staff assignments, data logs
11. CQI survey (S)	Support CQI team in developing, conducting, analyzing, and reporting first CQI survey	December 1999	April 2000	Survey instrument, report to department head, article
12. CQI presentations (R)	Present outline of county's CQI initiative to different departments	January 2000	Ongoing	Individual presentations, county-wide rollout
13. Consultation with Parks department (R)	Introduce CQI to Parks staff and initiate changes in department	January 2000	Ongoing	CQI presentation, review of team meetings, new mission statement, parks logic, reservation system process mapping
14. Outbreak investigation process (R)	Assist Outbreak Response Team in improving current processes and installing a measurement system	January 2000	Ongoing	Process maps, data tracking system, field guide
15. County relationship map (S)	Create a systems map showing the relations among departments	January 2000	Ongoing	Draft, reprioritized for criminal justice mapping; rescheduled for early 2001
16. Veterans affairs (S)	Support County Administrator's effort in establishing a Veterans Affairs department	February 2000	May 2000	Data on current county support services, compare to neighboring counties; maps; GDX analysis
17. Training consultation (R)	Suggest performance-based training options to HSD supervisor	March 2000	April 2000	Discussed in-field training opportunities

(S) Sponsor-assigned
(A) Author-suggested
(R) Requested by county staff

Project	Description	Start	End	Deliverable(s)
18. Friend of the Court phone staff (A)	Consult with phone staff and supervisor on possible ways to deal with angry customers	March 2000	August 2000	Data log and data summary
19. Family court supervisor strategic planning (R)	Conduct strategic performance improvement meeting for administrators and supervisors	April 2000	April 2000	Performance improvement items, team roles worksheet
20. CQI grant program (S)	Develop and promote program to provide departments with funds for quality improvement	April 2000	December 2000	Application and final report packet (announced in 7/00 and 9/00 newsletter
21. CQI self-study instrument (S)	Develop means for CQI team to assess departments' quality improvement efforts with respect to strategic CQI goals	April 2000	Ongoing	Two pilots in 2000, instrument distributed at rollout; team will implement in Spring 2001
22. Committee of the Whole meeting length (S)	Determine ways to reduce Committee of the Whole meeting length	April 2000	Ongoing	Data analysis using data since January 1997; several updates to commissioners
23. Kalamazoo criminal justice system process mapping (R)	Request by KCJC Chair to process map county's criminal justice system to facilitate system integration	May 2000	Ongoing	Felony case flow process maps of 9 justice system agencies, summary map, timelines
24. Resolution process mapping (R)	Request by Board Chair (via sponsor) to process map county's resolution process	May 2000	July 2000	Brochure for county commissioners and citizens; on county web site
25. County-wide performance measurement system (R)	Ex-officio consultant to performance measurement team; asked to co-author county-wide performance measurement training manual	May 2000	Ongoing	Contributions at semi-monthly meetings; no tangible deliverables by December 31, 2000

(S) Sponsor-assigned

(A) Author-suggested

(R) Requested by county staff

Project	Description	Start	End	Deliverable(s)
26. Gypsy moth objector survey (S)	Survey county residents who did not participate in county-wide gypsy moth spray program; used extant data instead	July 2000	August 2000	Obviated survey by using existing data analysis and report; data to Board on September 5, 2000
27. Cross-county team overlap (S)	Determine overlap of memberships among county-wide teams	July 2000	Ongoing	Drug Court pilot; reprioritized for justice system mapping
28. Board Office mission statement (S)	Work with Board Office staff to create departmental mission statement	August 2000	Ongoing	Reprioritized for justice system mapping; scheduled early 2001
29. KCJC organization chart (S)	Redesign extant chart for Kalamazoo Criminal Justice System Council	August 2000	October 2000	Organization chart adopted by KCJC October 20, 2000
30. Circuit Court process mapping (R)	Family Court administrators requested author to process map internal processes in family division	October 2000	Ongoing	Due to criminal justice system project, author provided instructional session to administrators
31. Inclement weather notification system (S)	Evaluate upcoming simulations of phone notification system informing staff of county government closing	December 2000	Ongoing	Review of system description; County Administrator will set simulation dates for early 2001

Appendix F

Aid for Generating Goal Statements
Based on Brethower (1984) and LaFleur and Brethower (1998)

AID FOR GENERATING GOAL STATEMENTS

What is the name of the system?

What is the primary activity of the system?

What are the primary products/services of the system?

Who are the recipients/customers of the products/services?

What do the recipients of the products/services do with the products/services (MISSION)?

How do the recipients benefit from using the products or services (GOAL)?

How does the larger society benefit from the recipients' uses of the products/services (IDEAL)?

GOAL STATEMENT

Name	THE PURPOSE OF
Service	IS TO
Customer	
Mission	
Goal	SO THAT
Ideal	

Appendix G

Kalamazoo County Mission Statement (as of July 1999) and the CQI Steering Team Mission Statement Developed in September 1999

KALAMAZOO COUNTY'S MISSION STATEMENT (AS OF JULY 1999)

To provide for a balanced level of high quality and efficiently delivered services determined on the basis of constitutional, statutory, and moral/social requirements funded within fiscal limitations for the purpose of improving the quality of life and preserving the blessings of liberty for the citizens of Kalamazoo County and Southwest Michigan.

CQI STEERING TEAM MISSION STATEMENT

The purpose of the CQI Steering Team is to enhance the ability of all Kalamazoo County employees to provide efficient and effective services that consistently address the needs of internal and external customers to improve the quality of life for the citizens of Kalamazoo County and Southwest Michigan.

Appendix H

Mission and Strategic Goals for Kalamazoo County's Continuous Quality Improvement Initiative

COUNTY CQI MISSION

To enable all Kalamazoo County employees to effectively and efficiently work toward achieving the County's mission and goals.

COUNTY CQI STRATEGIC GOALS

County CQI strives to achieve its mission by creating a workplace that provides all employees with:

1. *Information* necessary for excellent performance.
2. *Tools and resources* necessary for excellent performance.
3. *Timely and meaningful recognition* for their performance.
4. *Knowledge, skills, and attitudes* necessary for excellent performance.
5. A way to match each individual's *capacity and potential* to his/her job.

Appendix I

CQI Survey Items Organized by the Six Cells of Gilbert's (1996) Behavior Engineering Model

Cell 1: Information	Cell 2: Instrumentation	Cell 3: Incentives
• I clearly understand what I am expected to do to accomplish my job. • I understand how my job contributes to my customer's satisfaction. • I understand how my job contributes to the mission of the department. • I have the necessary information to do my job. • I know where to find the mission/vision of my department. • I am aware that the County is beginning continuous quality improvement (CQI) efforts. • My department practices quality improvement. • In addition to my job description, I have written goals for my job. • My supervisor provides timely feedback about my job performance. • My department measures its performance. • I know what the County mission and goals are.	• I have the appropriate tools/equipment to perform my job. • My department has a process to address problems. • My computer hardware and software are adequate for doing my job. • I am given sufficient time to complete my tasks. • I have checklists/manuals for infrequent or complicated tasks. • I am encouraged to find ways to improve my department's/program's work processes.	• My Performance Appraisal accurately reflects my job performance. • My supervisor gives me feedback on my improvement suggestions. • My supervisor rewards me for a job well done.
Cell 4: Knowledge and Skills	**Cell 5: Capacity**	**Cell 6: Motives and Values**
• I know what to do to perform my job. • I have the appropriate skills to complete all my job tasks.	• The stress level of my job is too high. • My job provides the opportunity to use my special skills or talents.	• I enjoy working for the County. • The mental aspect of my job is challenging/stimulating. • Overall, the morale in my department is high/medium. • I take pride in my work. • I like helping my customers.

Appendix J

CQI Survey Instrument

Kalamazoo County Government
Continuous Quality Improvement Survey 2000

	Yes	No	n/a
I know where to find the mission/vision of my department.	☐	☐	☐
In addition to my job description, I have written goals for my job.	☐	☐	☐
I know what the County mission and goals are.	☐	☐	☐
I am aware that the County is beginning continuous quality improvement (CQI) efforts.	☐	☐	☐

Please check one box for each question

	Always	Frequently	Sometimes	Never	n/a
I clearly understand what I am expected to accomplish in my job.	☐	☐	☐	☐	☐
I understand how my job contributes to my customer's satisfaction.	☐	☐	☐	☐	☐
My supervisor provides timely feedback about my job performance.	☐	☐	☐	☐	☐
I understand how my job contributes to the mission of the department.	☐	☐	☐	☐	☐
My department measures its performance.	☐	☐	☐	☐	☐
I have the necessary information to do my job.	☐	☐	☐	☐	☐
My department practices quality improvement.	☐	☐	☐	☐	☐
I have checklists/manuals for infrequent or complicated tasks.	☐	☐	☐	☐	☐
I have the appropriate tools/equipment to perform my job.	☐	☐	☐	☐	☐
My computer hardware and software are adequate for doing my job.	☐	☐	☐	☐	☐
I am encouraged to find ways to improve my department's/program's work processes.	☐	☐	☐	☐	☐
I am given sufficient time to complete my tasks.	☐	☐	☐	☐	☐
I know who my customers are.	☐	☐	☐	☐	☐
My department/program asks for customer feedback.	☐	☐	☐	☐	☐

	Always	Frequently	Sometimes	Never	n/a
My department acts on feedback from our customers.	☐	☐	☐	☐	☐
My department has a process to address problems.	☐	☐	☐	☐	☐
My supervisor rewards me for a job well done. If yes, how:_____	☐	☐	☐	☐	☐
My Performance Appraisal accurately reflects my job performance.	☐	☐	☐	☐	☐
My supervisor gives me feedback on my improvement suggestions.	☐	☐	☐	☐	☐
I have the appropriate skills to complete all my job tasks.	☐	☐	☐	☐	☐
I know what to do to perform my job.	☐	☐	☐	☐	☐
The stress level of my job is too high.	☐	☐	☐	☐	☐
My job provides the opportunity to use my special skills or talents.	☐	☐	☐	☐	☐
I take pride in my work.	☐	☐	☐	☐	☐
I enjoy working for the County.	☐	☐	☐	☐	☐
I like helping my customers.	☐	☐	☐	☐	☐
I read the County Connection newsletter.	☐	☐	☐	☐	☐

Please circle one answer for each question:

I find the Quality Corner articles in the County Connection:
a. Interesting
b. Not interesting
c. Don't read

Overall, the morale in my department is:
a. High
b. Medium
c. Low

The mental aspect of my job is:
a. Challenging/stimulating
b. Unreasonable
c. Boring/stagnate

February 2000

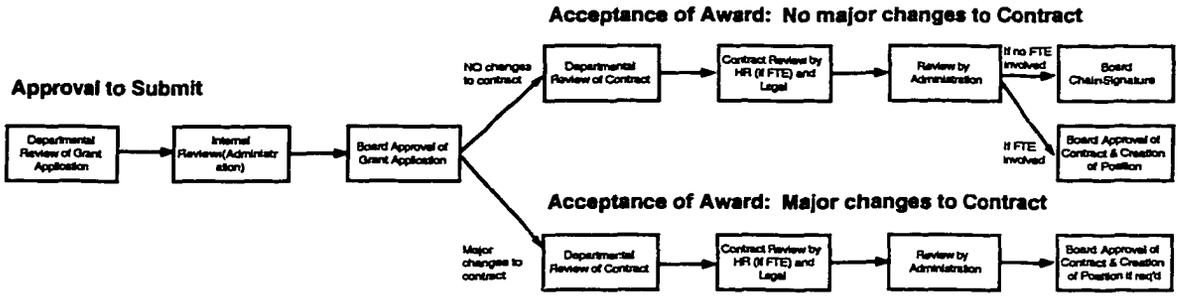
Thank you for your time and cooperation! Please return the completed survey in the enclosed envelope by **March 1, 2000** to *Jenny Beach, Human Resources*

Appendix K

Summary Process Map Included in Internal Grant Review Policy and Procedure Manual

Kalamazoo County Government: Internal Grant Review Procedure

Original Grant



Renewal Grant

Appendix L

Evaluation Checklists Used by Evaluators

Evaluation of the Design of the PROGRESSIVE CONSULTATIVE INTERNSHIP SYSTEM (PCIS)

Dear Sponsor-Evaluator:

Please answer this evaluation checklist after reviewing the enclosed design specifications. You may choose to not answer any question and simply leave it blank.

You are invited to add optional comments in the space provided below each question.

	Agree	Disagree	Can't answer
Purpose			
1. The progressive consultative internship system (PCIS) can contribute to performance consulting for county government.	☐	☐	☐
2. The purpose of the PCIS is relevant to county government.	☐	☐	☐
Assumptions			
3. Interns can effectively learn and consult.	☐	☐	☐
4. In my organization, it is feasible that consulting interns work consecutively on the same long-term project(s).	☐	☐	☐
5. *If you have a performance improvement system in place*: The internship system fits into my current performance improvement system.	☐	☐	☐

	Agree	Disagree	Can't answer
6. *If you do not have a performance improvement system:* The internship system would be helpful for developing a performance improvement system in my organization.	☐	☐	☐
Goals			
7. A consulting internship would allow my organization to receive cost-effective performance consulting.	☐	☐	☐
8. It is reasonable to expect the sponsor to select projects that are challenging to the intern and that contribute to the county's or department's performance improvement effort.	☐	☐	☐
Benefits			
9. The benefits are relevant to my organization.	☐	☐	☐
10. The benefits are realistic for my organization.	☐	☐	☐
11. This internship system could lead to long-term performance improvement.	☐	☐	☐
12. The projected benefits to my organization are worth the likely expense.	☐	☐	☐
Methods, Processes, and Tools			
13. The system's processes, tools, and their application are described clearly.	☐	☐	☐

	Agree	Disagree	Can't answer
14. The methods are sufficient for implementing and maintaining a progressive consultative internship system in my organization.	☐	☐	☐
15. It is feasible that the benefits to my organization can be attained as a result of applying the system's processes and tools.	☐	☐	☐
Planning			
16. The design clearly describes how to plan the internship system.	☐	☐	☐
17. The planning tools are useful.	☐	☐	☐
18. The design clearly identifies direct and indirect resources required from the sponsoring organization.	☐	☐	☐
19. The design clearly describes what is expected from the sponsor.	☐	☐	☐
20. The requirement for clerical staff support is reasonable.	☐	☐	☐
21. I should be able to obtain Board approval for such an internship system.	☐	☐	☐
Selection and Recruitment			
22. The design clearly describes how to select and recruit interns into the system.	☐	☐	☐

	Agree	Disagree	Can't answer
23. The intern recruitment tools are useful.	☐	☐	☐
24. The recommended pay (equivalent to graduate stipends at approximately $20/hour) is reasonable.	☐	☐	☐
Learning and Consulting Support			
25. The learning support tools are useful.	☐	☐	☐
26. The consulting support tools are useful.	☐	☐	☐
27. The time requirement for biweekly meetings with the intern is reasonable.	☐	☐	☐
28. It is feasible and practical for interns to have access to senior management's decision making processes.	☐	☐	☐
29. As member of senior management, I am able to provide relevant projects and for supervising the intern.	☐	☐	☐
30. Part-time consulting interns can become an accepted part of my organization.	☐	☐	☐
31. The design clearly addresses the issue of confidentiality.	☐	☐	☐

	Agree	Disagree	Can't answer
Evaluation			
32. Biweekly progress meetings with intern are sufficient to support intern learning and consulting.	☐	☐	☐
33. The continuous evaluation process and tools are useful.	☐	☐	☐
34. The year-end evaluation process and tools are useful.	☐	☐	☐
35. The long-term evaluation process and tools are useful.	☐	☐	☐
Tools Overall			
I would add more tools. Please describe.	☐	☐	☐
I would remove some tools. Please describe.	☐	☐	☐

Overall Evaluation of the Design of the

Progressive Consultative Internship System

Please check one of the three judgments about the entire system.

☐	**Excellent**	I can recommend implementation without changes.
☐	**Adequate**	I can recommend implementation with minor changes as indicated by my comments.
☐	**Not adequate**	I cannot recommend implementation without major revisions.

I would like to add the following evaluation criteria (optional):

Overall comments (optional):

Thank you for completing this design evaluation.

Please return the completed evaluation form using the provided self-addressed stamped envelope.

Evaluation of the Design of the PROGRESSIVE CONSULTATIVE INTERNSHIP SYSTEM (PCIS)

Dear Faculty Advisor-Evaluator:

Please answer this evaluation checklist after reviewing the enclosed design specifications. You may choose to not answer any question and simply leave it blank.

You are invited to add optional comments in the space provided below each question.

	Agree	Disagree	Can't answer
Purpose			
1. The progressive consultative internship system (PCIS) can contribute to performance consulting for county government.	☐	☐	☐
2. The purpose of the PCIS is relevant to HPT/OBM graduate education.	☐	☐	☐
Assumptions			
3. Interns can effectively learn and consult.	☐	☐	☐
4. Internships can be connected so they provide progressive learning opportunities and progressive organizational performance improvement.	☐	☐	☐

	Agree	Disagree	Can't answer
5. The internship system is consistent with current practices at my university.	☐	☐	☐
Goals			
6. A consulting internship in county government program could generate interesting and challenging assignments for my graduate students.	☐	☐	☐
7. The internship system would allow me to offer relevant internship projects to my current and prospective students.	☐	☐	☐
Benefits			
8. The benefits are relevant to HPT/OBM graduate education.	☐	☐	☐
9. The benefits are realistic to HPT/OBM graduate education.	☐	☐	☐
10. This internship system could develop into an ongoing internship program for both faculty and graduate students.	☐	☐	☐
11. This internship system could generate internship projects for other university departments and thus support collaboration between university and the community.	☐	☐	☐
12. The projected benefits to students and the department are worth the likely expense.	☐	☐	☐

	Agree	Disagree	Can't answer
Methods, Processes, and Tools			
13. The system's processes, tools, and their application are described clearly.	☐	☐	☐
14. The methods are sufficient for implementing and maintaining a progressive consultative internship system.	☐	☐	☐
15. It is feasible that the benefits can be attained as a result of applying the system's processes and tools.	☐	☐	☐
Planning			
16. The design clearly describes how to plan the internship system.	☐	☐	☐
17. The planning tools are useful.	☐	☐	☐
18. The design clearly identifies direct and indirect resources required from the university.	☐	☐	☐
19. The design clearly describes what is expected from the faculty advisor.	☐	☐	☐
Selection and Recruitment			
20. The design clearly describes how to select and recruit interns into the system.	☐	☐	☐
21. The intern recruitment tools are useful.	☐	☐	☐

	Agree	Disagree	Can't answer
22. This type of independent internship would not be suitable for undergraduate students.	☐	☐	☐
23. The recommended pay (equivalent to graduate stipends at approximately $20/hour) is reasonable and competes favorably with pay for consulting graduate students in the private sector.	☐	☐	☐
Learning and Consulting Support			
24. The learning support tools are useful.	☐	☐	☐
25. The consulting support tools are useful.	☐	☐	☐
26. The time requirement for biweekly faculty supervision is reasonable (not more than other internships).	☐	☐	☐
Evaluation			
27. Biweekly progress meetings with intern are sufficient to support intern learning and consulting.	☐	☐	☐
28. The continuous evaluation process and tools are useful.	☐	☐	☐
29. The year-end evaluation process and tools are useful.	☐	☐	☐

	Agree	Disagree	Can't answer
30. The long-term evaluation process and tools are useful.	☐	☐	☐

Tools Overall

I would add more tools. Please describe.	☐	☐	☐
I would remove some tools. Please describe.	☐	☐	☐

Overall Evaluation of the Design of the

Progressive Consultative Internship System

Please check one of the three judgments about the entire system.

☐	**Excellent**	I can recommend implementation without changes.
☐	**Adequate**	I can recommend implementation with minor changes as indicated by my comments.
☐	**Not adequate**	I cannot recommend implementation without major revisions.

I would like to add the following evaluation criteria (optional):

Overall comments (optional):

Thank you for completing this design evaluation.

Please return the completed evaluation form using the provided self-addressed stamped envelope.

Evaluation of the Design of the PROGRESSIVE CONSULTATIVE INTERNSHIP SYSTEM (PCIS)

Dear Intern-Evaluator:

Please answer this evaluation checklist after reviewing the enclosed design specifications. You may choose to not answer any question and simply leave it blank.

You are invited to add optional comments in the space provided below each question.

	Agree	Disagree	Can't answer
Purpose			
1. The progressive consultative internship system (PCIS) can contribute to performance consulting for county government.	☐	☐	☐
2. The purpose of the PCIS is relevant to my career plans.	☐	☐	☐
Assumptions			
3. Interns can effectively learn and consult.	☐	☐	☐
4. Internships can be connected so they provide progressive learning opportunities and progressive organizational performance improvement.	☐	☐	☐

	Agree	Disagree	Can't answer
Goals			
5. A consulting internship in county government program could generate interesting and challenging assignments.			
6. A county government internship will add value to my interpersonal and professional repertoire.			
Benefits			
7. The benefits are relevant to my career plans.	☐	☐	☐
8. The benefits are feasible.	☐	☐	☐
9. This internship system could provide research opportunities for faculty and graduate students.	☐	☐	☐
10. The recommended pay (equivalent to graduate stipends at approximately $20/hour) is reasonable and competes favorably with pay for consulting graduate students in the private sector.	☐	☐	☐
Methods, Processes, and Tools			
11. The system's processes, tools, and their application are described clearly.	☐	☐	☐
12. The methods are sufficient for implementing and maintaining a progressive consultative internship system.	☐	☐	☐

	Agree	Disagree	Can't answer
13. It is feasible that the benefits can be attained as a result of applying the system's processes and tools.	☐	☐	☐
14. The tools will help me navigate in a large organization (e.g., orientation to organization, broad projects).	☐	☐	☐
Planning			
15. The design clearly describes how to plan the internship system.	☐	☐	☐
16. The planning tools are useful.	☐	☐	☐
Selection and Recruitment			
17. The design clearly describes how to select and recruit interns into the system.	☐	☐	☐
18. The intern recruitment tools are useful.	☐	☐	☐
19. This type of independent internship would not be suitable for undergraduate students.	☐	☐	☐
20. I would use the internship portfolio in my job search.	☐	☐	☐
21. The design clearly describes what is expected from the intern.	☐	☐	☐

	Agree	Disagree	Can't answer
Learning and Consulting Support			
22. The learning support tools are useful.	☐	☐	☐
23. The consulting support tools are useful.	☐	☐	☐
24. The learning and consulting support tools support my working independently.			
Evaluation			
25. Biweekly meetings with the sponsor and faculty seem sufficient to support my learning and consulting.	☐	☐	☐
26. The continuous evaluation process and tools are useful.	☐	☐	☐
27. The year-end evaluation process and tools are useful.	☐	☐	☐
28. The long-term evaluation process and tools are useful.	☐	☐	☐

	Agree	Disagree	Can't answer
Tools Overall			
I would add more tools. Please describe.	☐	☐	☐
I would remove some tools. Please describe.	☐	☐	☐

Overall Evaluation of the Design of the

Progressive Consultative Internship System

Please check one of the three judgments about the entire system.

☐	**Excellent**	I can recommend implementation without changes.
☐	**Adequate**	I can recommend implementation with minor changes as indicated by my comments.
☐	**Not adequate**	I cannot recommend implementation without major revisions.

I would like to add the following evaluation criteria (optional):

Overall comments (optional):

Thank you for completing this design evaluation.

Please return the completed evaluation form using the provided self-addressed stamped envelope.

Appendix M

Project Approval from the Human Subjects Institutional Review Board

Human Subjects Institutional Review Board

Kalamazoo, Michigan 49008-5162
616 387-8293

WESTERN MICHIGAN UNIVERSITY

Date: 13 December 2000

To: Dale Brethower, Principal Investigator
Peter-Cornelius Dams, Student Investigator for dissertation

From: Michael Pritchard, Interim Chair Michael A. Pritchard

Re: HSIRB Project Number: 00-11-19

This letter will serve as confirmation that your research project entitled "A Systems Approach to Designing an Internship Model that Benefits the Interning Organization" has been **approved** under the **expedited** category of review by the Human Subjects Institutional Review Board. The conditions and duration of this approval are specified in the Policies of Western Michigan University. You may now begin to implement the research as described in the application.

Please note that you may **only** conduct this research exactly in the form it was approved. You must seek specific board approval for any changes in this project. You must also seek reapproval if the project extends beyond the termination date noted below. In addition if there are any unanticipated adverse reactions or unanticipated events associated with the conduct of this research, you should immediately suspend the project and contact the Chair of the HSIRB for consultation.

The Board wishes you success in the pursuit of your research goals.

Approval Termination: 13 December 2001

Appendix N

Script for Recruiting Evaluators

I am wondering if you would be willing to participate in my dissertation project. Before you decide, let me give you an overview of what the dissertation is about and what your participation would involve.

I am using a prepared script required and approved by Western's Human Subjects Institutional Review Board.

My dissertation project involves the design of an internship system for county governments. The interns function as performance consultants. The system would provide county governments with a cost-effective alternative to expensive outside consultants and to the time-consuming approach of utilizing only county staff.

The internship system would be used by county officials who sponsor the internships, faculty advisors who coach the interns and supervise the internship system, and graduate students who are the consulting interns.

Such a consultative internship could add value by helping county officials and county staff to improve the effectiveness and efficiency of government performance and to improve the quality of service they provide to the county's citizens.

An important part of my dissertation is the evaluation of that internship design. In order to evaluate it, I am asking two representatives from each of the three user groups to evaluate the design specifications.

I have asked I/O faculty in our department to suggest advanced masters and doctoral students to participate in the evaluation from the perspective of an intern. The faculty suggested you. That's why I'm talking you now—to ask you to participate in the evaluation.

The evaluation involves that you read the design specifications (about 39 pages) and that you answer an evaluation questionnaire (about 40 questions). I will also ask you to read and sign a consent form required and approved by Western's HSRIB.

I estimate that it may take 2 to 3 hours for you to read the design specifications and answer the evaluation questionnaire. I will not be able to pay you for your time, but as a token of my appreciation I will give you a $20 gift certificate for Barnes & Noble.

You may stop participating in the evaluation at any time.

My advisor assured me that your evaluation of my design does not affect the outcome of my dissertation. That is, the dissertation can be successful regardless of your answers. The main purpose of this dissertation project is to demonstrate scientific work. I will do that by designing the system, evaluating it through outside people, and making suggestions for improving the design.

Do you have any questions about this project at this time?
Will you be willing to serve as evaluator on this project?

This is what I will say if students agree to participate
Thank you for being willing to participate in this project. I will send the material out to you shortly, together with a brief cover letter and a required consent form. I will also include a self-addressed stamped envelope. *(If I speak with the student/participant in person, I will hand them the material at this time.)*

This is what I will say if students do not agree to participate.
Thank you for considering my proposal. It was good talking to you.

Note that I will use the content of this script when contacting potential sponsor and faculty advisor participants.

This is what I will say if a sponsor or faculty advisor do not agree to participate.
Thank you for considering my proposal. Can you think of another county official (*faculty*) who I might ask?

Appendix O

Design Specifications for the Progressive Consultative Internship System Used by Evaluators

Design Specifications for Evaluating the

PROGRESSIVE CONSULTATIVE INTERNSHIP SYSTEM (PCIS)

Introduction

This document contains the design specifications for the progressive consultative internship system (PCIS). It has all the information needed to develop the internship system into a complete manual. The purpose of this design document is to lay open and clearly describe all of the internship system's components so that it can be thoroughly evaluated.

The design of the PCIS is based on an extensive literature review covering internship and consulting literatures, public sector performance measurement and improvement literatures, and literature on performance consulting.

Improve Effectiveness and Efficiency of Service Delivery

County governments face increasing demands to improve effectiveness and efficiency of service delivery. County officials must balance citizen demands and citizen needs against their statutory mandates and fiscal prudence. In addition, the Government Performance and Results Act (GPRA) requiring federal and state agencies to report performance measures is beginning to have an effect at the local level as more and more funding agencies require performance reporting from local units of government.

How Counties Can Improve Performance

County governments have responded to the call for increased performance in basically two ways. One way involves the hiring of outside consultants to analyze the current performance system and to recommend ways to improve internal processes and service delivery. The implementation of these recommendations rests to a large degree on the shoulders of county staff. The other way county governments have undertaken their quality improvement efforts involves developing a performance improvement capabilities within the organization. Staff learn about performance improvement by reading the applicable literatures, attending workshops and conferences, and—by just doing it. Each approach has advantages and disadvantages.

Consultant Approach

The consultant approach provides a fast delivery of improvement recommendations. The downside is that qualified local consultants with public sector experience may be hard to find and that national experts can be very expensive. Thus, recommendations are often costly and still require staff to learn about process improvement and performance measurement as they implement these recommendations. In some cases, consultants' recommendations may not be implemented at all, and their expensive reports gather dust on some bookshelf. This leaves county officials vulnerable to charges of wasting taxpayers' money.

Internal Approach

The advantage of the internal approach is that it is more cost-effective and that, early on, staff have the opportunity to actively participate in the improvement initiative. Counties who have taken this approach beginning in the 1980s and 1990s are now national leaders in local government performance measurement and improvement. The downside of the internal approach is that most staff do not have the expertise to conduct performance improvement, and that learning about it can become an additional burden to already overworked staff.

A Third Option: Consulting Intern

There is, however, a third option. This option combines the other two approaches in that graduate students can function as internal performance consultants. The progressive consultative internship system provides a framework for county officials and university faculty to plan and implement an internship system that provides interns with an opportunity to both learn about performance consulting and to function as internal consultant to county government.

Graduate students in human performance technology (HPT) or similar fields, such as organizational behavior management or industrial/organizational psychology have the expertise to consult within a county organization. Many of them have the opportunity to work in private sector organizations as they complete their studies, providing businesses with cost-efficient expertise. Offering a public sector performance consulting internship allows some of them to learn about the public sector before embarking on their professional career.

The Internship System's Users

Users of the progressive consultative internship system are the interns, the sponsors and the faculty advisors. They work together to connect intern learning and organizational performance improvement. Their roles differ from traditional internship roles because the PCIS casts interns as both learner and expert, the sponsors as mentors and clients, and the faculty advisors as coaches and administrators. The consultative internship system dispenses with the traditional role of an intern supervisor who is in daily supervisory contact with the intern; instead, it places interns in an autonomous role as consultant and performance expert.

The Interns

Interns in the PCIS are both learners and experts. They have to balance their internship goal of learning with their role as consulting expert to the organization.

Interns as Learners

As learners, interns apply their (mostly) theoretical knowledge of performance technology, principles, and tools to a real-world performance system with real-world performance problems, namely county government. Interns learn how local government operates, how to interact with government officials and staff, and how to effectively apply human performance technology (HPT) within a government system.

Interns as Experts

As experts, interns conduct projects that are directly or indirectly linked to organizational performance. For example, projects directly linked to organizational performance improvement may include process improvements or performance-based instruction. Projects indirectly linked to performance improvement may include strategic planning, developing organizational charts, or conducting surveys.

Other consulting activities may include facilitating meetings, report writing, and orally presenting information to management and staff. Performance improvement and performance measurement may be new to county government, and staff may be concerned about the implications of organizational change, such as unfamiliar job responsibilities. To support staff during the times of change, interns champion the performance improvement effort within the organization through written and personal communication in non-technical language, and, foremost, through projects that support county employees in their daily work.

Interns as Educators

Consulting interns are also educators. When interns transfer performance improvement technology to employees they enable the organization to maintain performance improvements and, possibly, to conduct performance improvement projects without (much) intern involvement. Interns may educate staff on an

individual basis, through presentations, exercises, or collaboration on actual projects. They may also model the use of performance improvement tools as they conduct various consulting projects.

The Sponsor

Most internship agree that members of senior management should function as the intern's primary supervisor; support by top executives is also essential for any consultant's success. Thus, an appropriate sponsor for the PCIS at the county would be a high-level executive such as the county administrator or a department head. The county administrator will be in the position to provide interns with projects that may have general organization-wide impact. With the county's executive as sponsor, interns will be able to have access to top level decision-makers and decision-making processes. A department head, on the other hand, will be more likely to have consulting opportunities that relate to more direct performance issues since the department head is more immediately involved in providing services to citizens than is the county administrator.

In traditional government internships interns are supervised by and learn from a "practitioner supervisor." This is also the case in many clinical, medical, engineering, and other professional internships. The PCIS sponsor, on the other hand, cannot provide this degree of supervision and mentoring because he or she does not have the necessary degree of expertise in human performance technology. It is the author's opinion that both types of executive can make excellent sponsors as long as they are prepared to support change in their respective organizations. The sponsor, whether county administrator or department head, will have two roles, namely that of intern's mentor and that of the intern's main client.

Sponsor as Mentor

As experienced public administrator, the sponsor mentors interns on county government theory and practice and introduces them to the formal and informal organization. Sponsors may teach interns through personal discussions, by

providing literature, and by having interns attend top-level meetings within and outside the county organization.

Sponsor as Client

As interns' client, the sponsor assigns projects but does not have the expertise to supervise interns with respect to selecting appropriate interventions. However, the sponsor-client is in the position to make interns aware of limitations and restrictions of applying HPT within the county organization. As client, the sponsor requests interns to conduct specific projects and allocates resources, such as funds and staff support.

The Faculty Advisor

Because the sponsor is not a subject matter expert in the area of human performance technology, interns in the consultative internship system are not assigned to the sponsor as a "master" who takes on an "apprentice." Instead, the faculty advisor takes on the role of subject matter coach and internship administrator and, thus, provides the professional safety net for the intern.

Faculty Advisor as Coach

As coach, the faculty advisor provides professional supervision for interns as they apply HPT within the county organization. The degree of coaching depends on each intern's expertise, the complexity of the projects, and difficulties or conflicts arising during the internship. The faculty advisor also monitors that interns attend to learning activities such as reading relevant literature on HPT applications in county government. This is necessary because interns may take on so many projects that they don't find the time to read performance-related HPT and government journals.

Faculty Advisor as Administrator

The faculty advisor as administrator acts as liaison between interns and sponsor and intervenes when problems or difficulties occur that the intern cannot handle. The internship system attempts to resemble a real-world consulting

environment as much as possible. That includes the possibility for interns to make, and correct, mistakes. The faculty advisor will take great care to not interfere with the intern's consulting unless he or she foresees potential problems such as the possible waste of financial resources. With respect to the long-term maintenance of the system, the faculty advisor will be responsible for supplying new interns.

Design of the Internship System

This section specifies the program theory of the internship system design. It delineates the progressive consultative internship system's purpose, defines its short-term goals and long-term benefits for all three user groups, and outlines methods needed to achieve these goals and benefits. Figure 1 provides an overview of the design's conceptual logic that shows the development of the PCIS as it evolves from three general models to specific processes and tools. This section of the present chapter follows the steps of the design logic.

Models and System

The internship system is based on three models, namely successful internships, successful consulting, and human performance technology. The internship system incorporates the first two models into its support processes and tools. Individual interns add their specific expertise in human performance technology. The internship system provides a framework that supports interns' independent consulting in county organizations. These three models provide the theoretical foundation for achieving the internship system's purpose.

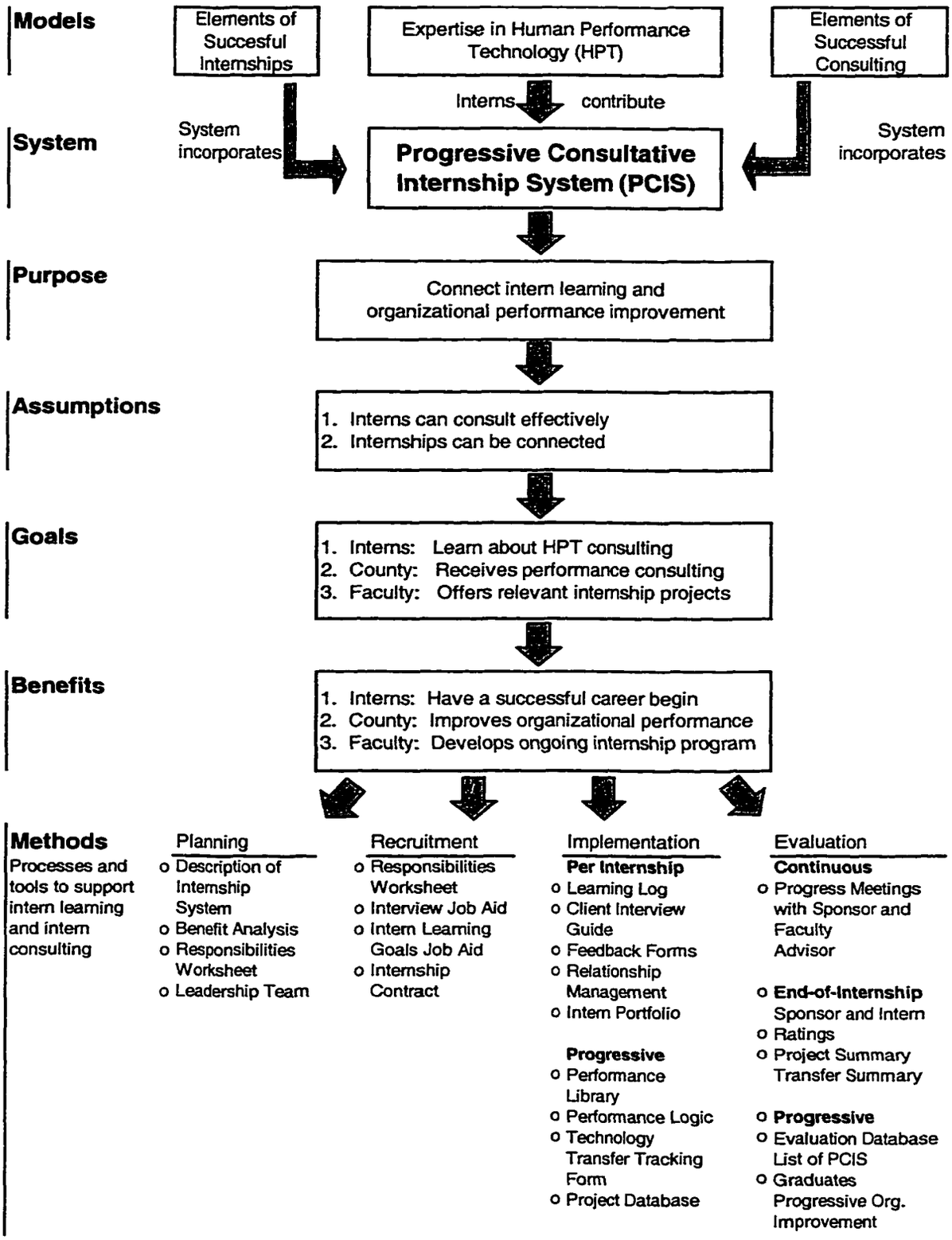


Figure 1. Program Theory: Design Logic of the Progressive Consultative Internship System.

Purpose

The purpose of the progressive consultative internship system is to combine intern learning with organizational performance improvement. It attempts to do so by connecting individual HPT internships so they form a continual consulting process within the interning county organization. This progression can work because each intern's accomplishments set the stage for the following intern's consulting, thereby ensuring both continuation and progression.

The progressive connection of internships supports the PCIS purpose in that it enables interns and their sponsor to build specific interventions into a system of county-wide performance improvement that spans across departments. This progressive nature of the PCIS is important for showing county officials that the internship system connects to the organization's performance in a meaningful way. Without the prospect of a progressive nature, county officials may not be willing to commit the resources necessary to support a long-term internship program.

A secondary purpose of the PCIS is to support the interning organization and the university in developing a mutually beneficial relationship. Spending county and university resources for establishing and maintaining the internship system is worthwhile only when the system provides short-term and long-term benefits to both stakeholders. Unless the county realizes lasting organizational benefits and the PCIS provides meaningful and challenging internships to the university's graduate students, the internship system will not be able to achieve its long-term benefits.

Assumptions

The design of the progressive consultative internship system rests on two assumptions. The first assumption is that interns can consult effectively. The second assumption is that individual internships can be connected so they provide a progression in learning opportunities and organizational performance improvement.

Assumption 1: Interns Can Consult Effectively

The first assumption is that interns, as experts, can provide effective performance consultation to the interning county government. Effective means that interns develop and implement performance improvement and performance management systems, and that these systems, eventually, generate demonstrable organizational performance improvement. Interns achieve these goals as they solve specific performance problems or develop organizational strategies support for long-term performance improvement. Effective also means that interns transfer human performance (HP) technology into the county organization to enable county staff to conduct and maintain performance improvement projects.

Assumption 2: Internships Can be Connected

The second assumption is that internships can be connected in two ways. With respect to learning, the PCIS provides subsequent interns with progressive learning resources; with respect to consulting, it provides the county with (almost) seamless cost-effective internal performance consulting. This dual progression is a key element of the design because internships and organizational performance improvement occur in different timeframes. The former typically last one year while the latter extends beyond a single internship as projects may take several years to complete. For example, Dallas County reported that it took seven years to install a county-wide performance measurement system; organizational performance improvement is, in fact, never truly completed. It would be impractical, therefore, to view each PCIS internship as a self-contained student project independent from preceding and subsequent internships. The progressive consultative internship system works within these dual timeframes and provides tools for making progressive connections.

The progressive nature also serves to optimize intern learning. As interns learn about the interning county, about county, state, and federal government in general, and about performance improvement in the public sector, they collect relevant learning resources, such as books, journal articles, or copies of Internet-based information. Subsequent interns access this progressive knowledge base and accelerate their own learning. Figure 2 shows conceptually how this knowledge

progression sets the PCIS apart from traditional internships in which learning resources remain fairly stable across time.

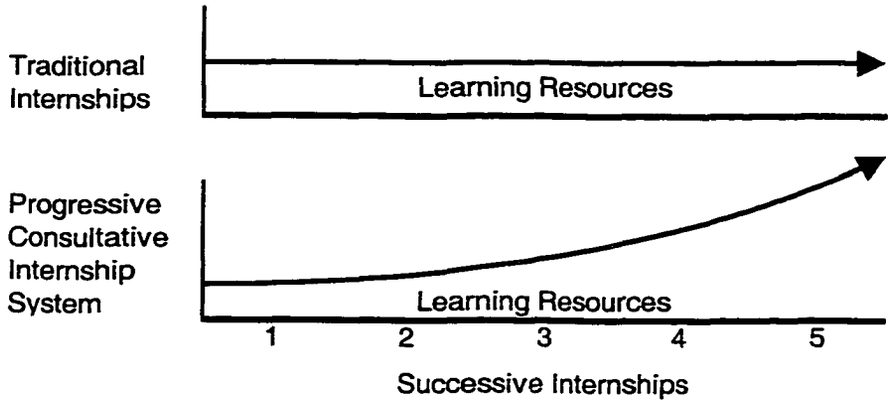


Figure 2. Program Theory: Comparison of Learning Resources between Traditional Internship Programs and the PCIS.

Goals

The goals of the progressive consultative internship system represent short-term benefits to be realized during each internship. These goals are (1) interns learn by consulting, (2) interning county receives performance consulting, and (3) faculty sponsor offers relevant internship projects.

Goal 1: Interns Learn about HPT Consulting

The goal for individual interns is to learn about HPT consulting. Most learning will occur as interns interact with clients and conduct performance improvement projects and, thus, improve their consulting and interpersonal skills. These skills are important for successful professional consulting. Additional, theoretical learning, will occur as interns read articles and Internet-based information related to performance improvement in the public sector. Articles and Internet links may be provided by the sponsor or by county staff the interns are working with on specific performance improvement projects.

Goal 2: County Receives Performance Consulting

The goal for the sponsoring organization during each internship is to receive performance consulting that contributes to the county's efforts in improving its organizational performance. During each individual internship, interns conduct progressive performance improvement as they use previous interns' accomplishments. For example, one intern may work with staff to establish a performance measurement system for a specific project and begins to collect baseline data. The following intern uses these data to troubleshoot performance and to develop and implement an intervention. Data for maintaining the intervention will be collected with the first intern's performance measurement system. This example does not imply that interns cannot achieve actual performance improvements during their individual internship. The point is that even though this hypothetical performance improvement was not completed by the first intern, it was a step toward performance improvement. Thus, interns can provide relevant performance consulting during their internship that contributes to performance improvement in both the short-term and the long-term.

Goal 3: Faculty Sponsor Offers Relevant Internship Projects

The faculty sponsor's goal with each internship is to offer relevant applied projects to his or her graduate students. Faculty have the challenge to provide graduate students with projects that they could use to fulfill practicum requirements or that are appropriate for their theses or dissertations. The internship system gives faculty the opportunity to offer these types of projects to their graduate students.

Benefits

Benefits are the long-term outcomes for each user. They differ from goals in that they extend beyond individual internships. The PCIS is designed to provide the following three benefits: (1) interns have a successful career begin, (2) the interning county improves organizational performance, and (3) the faculty advisor develops an ongoing internship program.

Benefit 1: Interns Have a Successful Career Begin

Many interns benefit from completing an internship by increasing the chance of landing a post-graduation job with a preferred organization and of receiving higher starting salaries than non-interns. The long-term PCIS benefit for interns is that their to a large degree independent consulting experience within county government makes them attractive to potential employers in both the public and private sectors. Thus, they may land jobs that match their education and meet their intellectual and financial expectations.

Benefit 2: County Improves Organizational Performance

The sponsor's reason for implementing a progressive consultative internship system is to recruit cost-effective expertise to provide organizational performance consulting. That does not mean that PCIS interns are the only source for generating performance improvement; the organization may also utilize external consultants as well as county staff for its performance improvement efforts. Interns may support the implementation of consultant-recommended or staff-developed performance improvement projects. In any case, the county will maintain a progressive consultative internship system only when it leads to measurable improvements (e.g., customer satisfaction, process improvements, reduced turnover).

Benefit 3: Faculty Advisor Develops an Ongoing Internship Program

Over time, the faculty advisor may develop the PCIS into an internship program that becomes an important part of the department's educational offerings. An ongoing internship program for performance consulting in county government could be used to recruit highly-qualified students into the department.

As county and department cooperate to recruit interns and support their internships, they may identify opportunities for cooperation outside the area of HPT, such as public administration, criminal justice, or marketing. The faculty advisor would be in a position to establish initial connections to other university departments who can provide the necessary expertise. Possibly, other units of local government, such as a city, may learn about the PCIS and, if it is successful at the county, may install the PCIS into their own organization. Thus, the internship system may over

time generate additional venues for the university to collaborate with important members of the local community.

Methods

Achieving the short-term goals and long-term benefits requires methods that transform the system's model, purpose, and assumptions into a feasible and useful internship system. The design of the progressive consultative internship system incorporates the following four methods: (1) planning the internship system, (2) selecting and recruiting qualified interns, (3) implementing learning and consulting support, and (4) evaluating intern learning and organizational performance improvement (Figure 3). This section outlines these four methods. The remainder of the chapter specifies each method's specific processes and tools in detail.

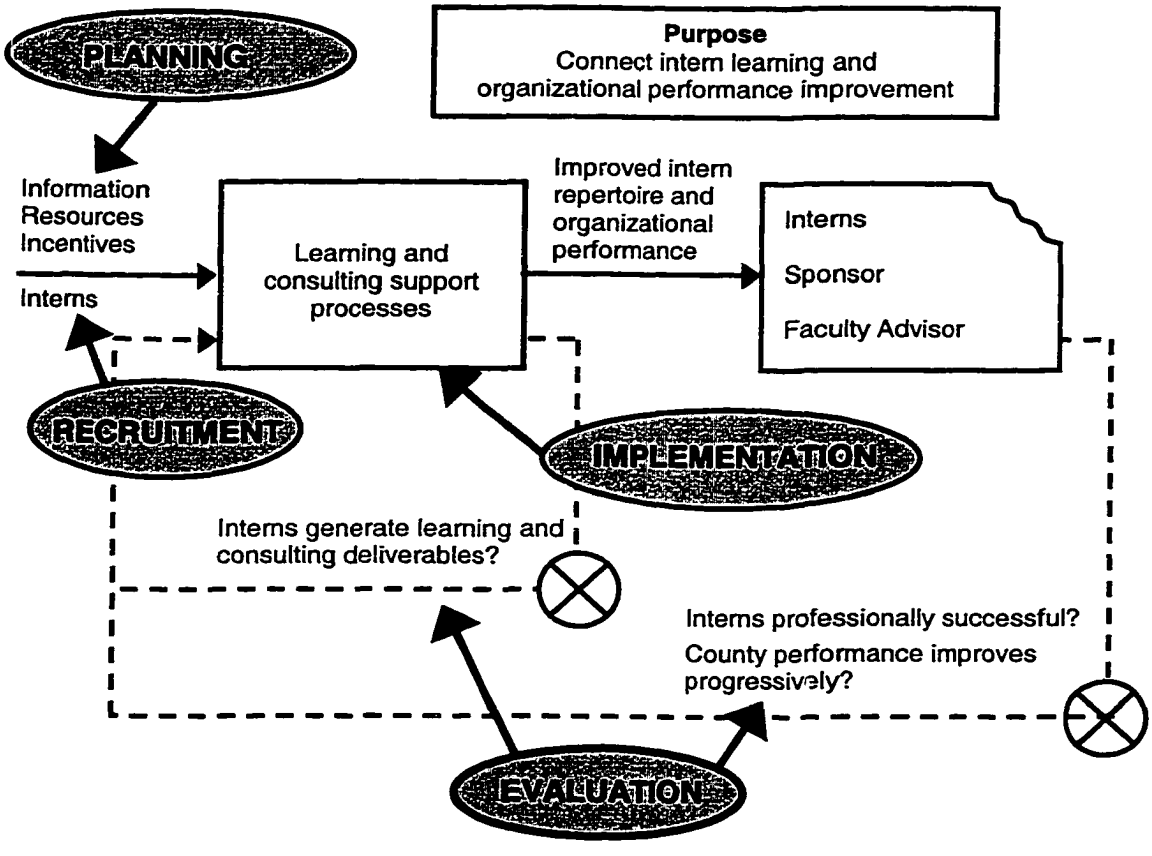


Figure 3: Program Theory: Four Methods for Achieving Short-term Goals and Long-term Benefits

Method 1: Planning

Consider the following scenario. Several government officials, HPT faculty, and graduate students have received a document that outlines the purpose of the progressive consultative internship system. What information do officials and faculty need to decide if they want to set up and maintain such a system? What information do graduate students need to decide if they want to enroll in a consultative internship?

The purpose of the planning process is to provide users with this information so they understand the goals and benefits of the PCIS. The PCIS planning process focuses on sponsor and faculty advisor because the burden of establishing and maintaining the system falls on them. The PCIS will support their decision-making by providing tools that clearly describe the necessary resources and responsibilities. At the end of a successful planning process, sponsor and faculty will agree to implement the progressive consultative internship system.

Another type of successful outcome can occur when a government official, for whom the PCIS may not be the right solution, decides not to implement it. For example, a county official with urgent large-scale performance problems may decide to use a consulting firm because it has the ability to send an entire consultant team to the organization and to quickly develop recommendations for performance improvement. (However, PCIS interns would be well suited for supporting the county in implementing the consultants' recommendations.)

Method 2: Selection and Recruitment of Qualified Interns

The success of the internship system is not only a function of planning the internship system; it also requires a supply of qualified graduate students to take on the consulting role. Faculty typically know which of their graduate students may suited for, and would benefit from, such an internship. Therefore, selection and recruitment tools specifically guide sponsor and interns through the interview and contract process.

Method 3: Implementation of Learning and Consulting Support

The PCIS must be able to support learning and consulting during both individual internships and across successive internships. The tools must allow interns to optimize learning and consulting, otherwise one or the other will suffer. For example, it will be tempting for interns to spend most of their time on performance improvement projects. While not a problem in the short-term, this subsystem maximization may defeat the purpose of the internship system because learning should not only consist of hands-on consulting but also of acquiring additional theoretical knowledge with respect to performance improvement in the public sector.

Method 4: Evaluation of Progress Toward Goals and Benefits

Intern learning is the central focus of all internships. Most internship programs evaluate the quality of intern learning by changes in interns' knowledge, skills, and abilities (KSAs). In additions, interns have to document the successful completion of behavioral requirements, such as number of client contact hours, total hours supervised, and training activities attended. Benefits to the organization are typically not part of internship evaluations, although some organizations assess those separately from intern learning. In other words, traditional internships are considered successful as long as interns get something out of them even if organizations do not realize tangible benefits, other than having an inexpensive alternative to professional staff.

The hallmark of good performance consulting is its focus on evaluation. In contrast to traditional internship evaluations, the PCIS evaluates success not only by intern learning but also by the outcomes of intern consulting. The PCIS design incorporates short- and long-term evaluation into all phases of the internship system (Figure 4). These evaluation processes assess intern learning and organizational performance improvement.

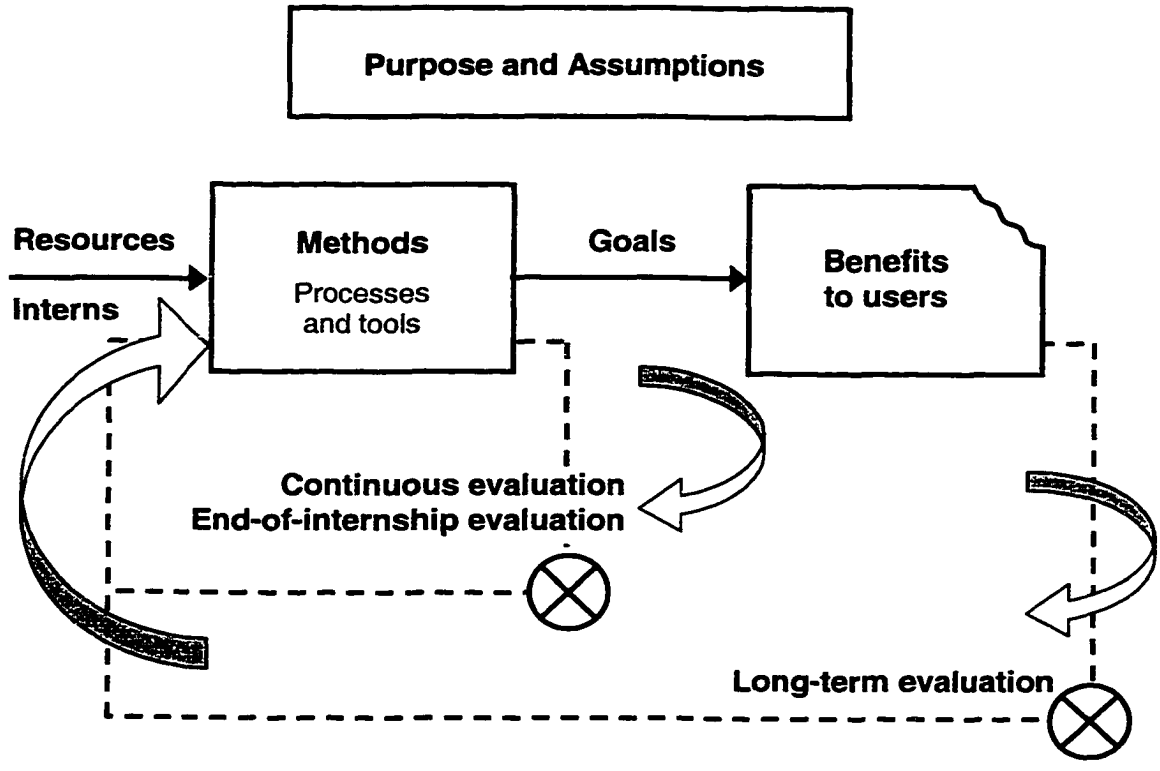


Figure 4. **Program Theory: Evaluation in the Progressive Consultative Internship System.**

Processes and Tools

This part of the design document describes the specific tools the progressive consultative internship system will provide to support the users in implementing the methods described above. The rationale is that these tools help all users to achieve their respective internship goals and benefits. Figure 5 lists the four major methods for setting up and running the PCIS. At the beginning of each of the following four sections, the specific tools particular to that section, will be added.

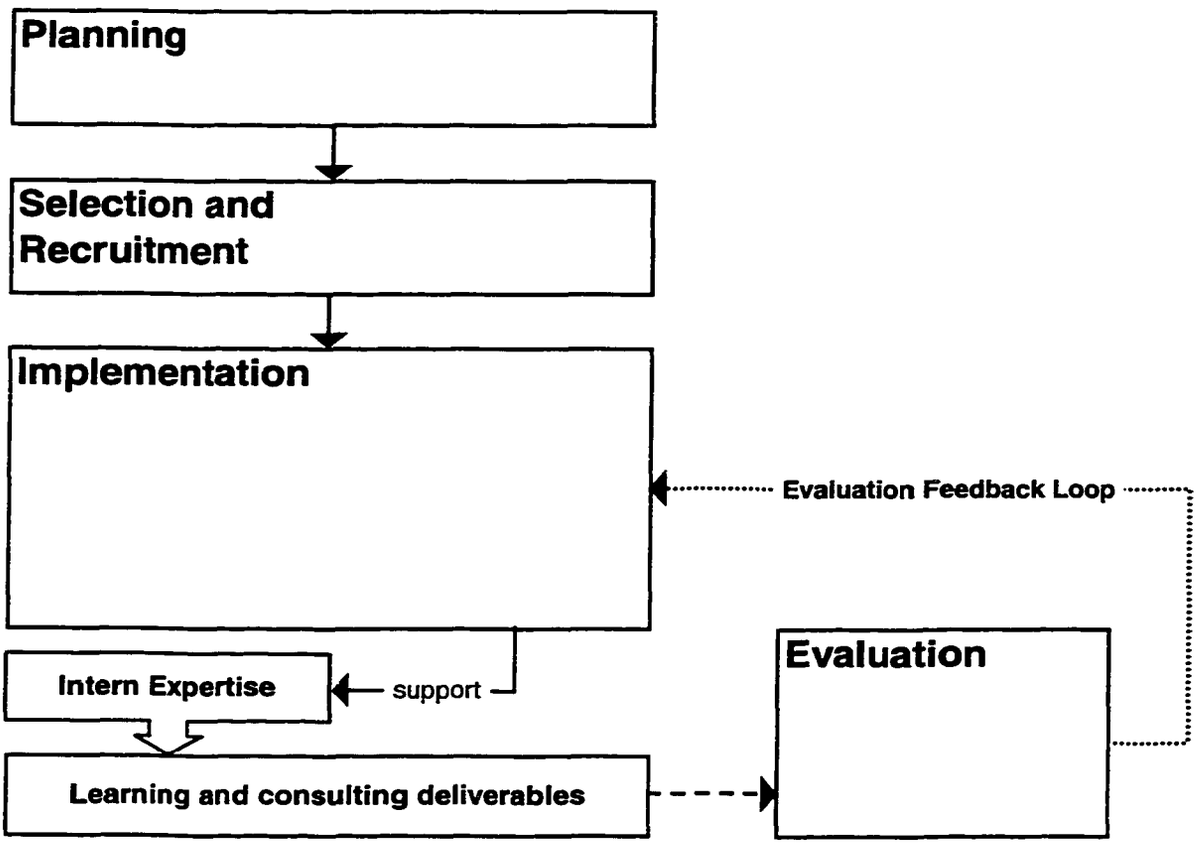


Figure 5. **Diagram of Processes for Planning, Implementation and Evaluation of the Progressive Consultative Internship System.**

Planning Tools

The PCIS will include the following planning tools: (1) a description of the PCIS, (2) a benefit analysis, and (3) a responsibility worksheet, and the performance improvement leadership team (Figure 6). The faculty advisor may choose to involve the prospective first intern in the planning process; however, no specific tools are included for the intern during this phase. It is implied here that the faculty will be familiar with the internship system prior to working with potential sponsors on planning to implement the PCIS in their county organization.

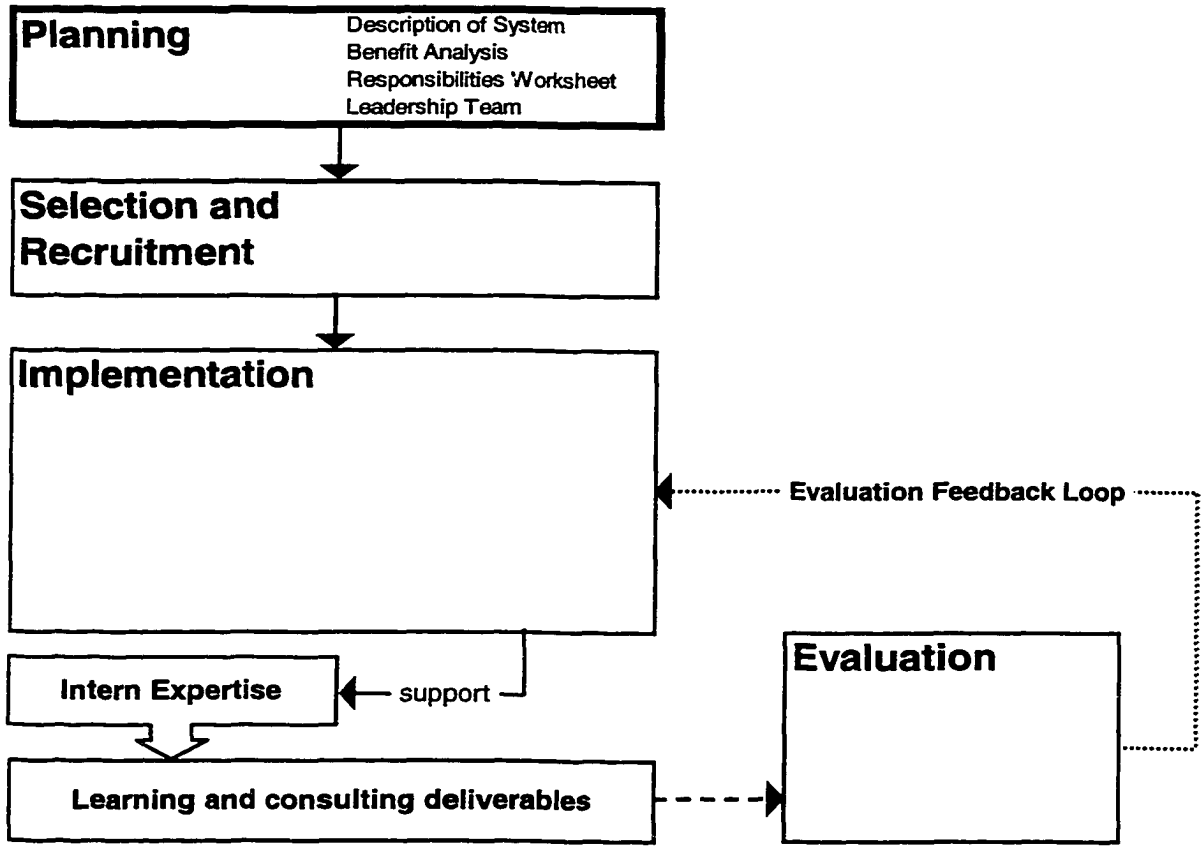


Figure 6. **Tools for Planning the Progressive Consultative Internship System.**

Planning: Description of Internship System	
Purpose	• Interest potential users in setting up the progressive consultative internship system
User(s)	Sponsor Faculty Advisor Intern
Outline	• Explains internship system and its rationale • Outlines short- and long-term benefits • Describes how system connects individual one-year internships to achieve long-term performance improvement in county organization • Describes need for county government to change in response to citizen demands, diminishing resources, federal mandate, and a constantly shifting social and economic environment • Positions the PCIS as a possible means of cost-effective performance improvement

Planning: Benefit Analysis Worksheet	
Purpose	• Determine if PCIS can address specific short-term and long-term performance improvement needs in county organization
User(s)	Sponsor Faculty Advisor
Outline	• Guides discussion regarding performance improvement issues in county government (e.g., respond to citizen complaints, resolve performance problems, improve inefficient processes) • Explores other option what county can do about them (e.g., working with outside consultants, conducting performance improvement projects with its own staff, hiring interns to serve as internal consultants, or a combination of all three) • Prompts the sponsor to identify specific projects that could be taken on by HPT interns.

Planning: Sponsor and Faculty Responsibilities Worksheet	
Purpose	• Provide sponsors and faculty advisors with list of responsibilities
User(s)	Sponsor Faculty Advisor
Outline	**Sponsor** • Spend 2 to 3 hours per month in one-on-one progress meetings with interns • Provide resources such as clerical support for interns, office space, supplies, a personal computer, and access to the county's intranet and e-mail system. • Place intern on sponsor's mailing list to keep intern abreast of high level decision making processes • Intern salary to be competitive with other graduate student employment opportunities within or outside university setting (e.g., $20/hour) **Faculty advisor** • Maintain flow of interns into system • Select students who can function as internal consultants with minimal faculty guidance • Spend 2 to 3 hours per month in one-on-one progress meetings with interns

Planning: Performance Improvement Leadership Team	
Purpose	• Support the sponsor's commitment to performance improvement within the county organization • Support intern
User(s)	Sponsor Intern
Outline	• Include managerial, professional, and technical staff • Team works with intern on developing and implementing improvement projects • Provide interns with valuable insight into both the formal and informal organization • Identify obstacles and barriers to specific performance improvement projects, processes, and tools • Champion county-wide performance improvement throughout the organization

Intern Selection and Recruitment

Once sponsor and faculty advisor agree to set up the progressive consultative internship system, they will work together on selecting and recruiting their first intern. Unlike the planning phase, intern selection and recruitment will occur on a regular basis, most likely annually. Figure 7 shows the tools for intern selection and recruitment: (1) interview job aid, (2) intern learning goals job aid, and (3) the internship contract.

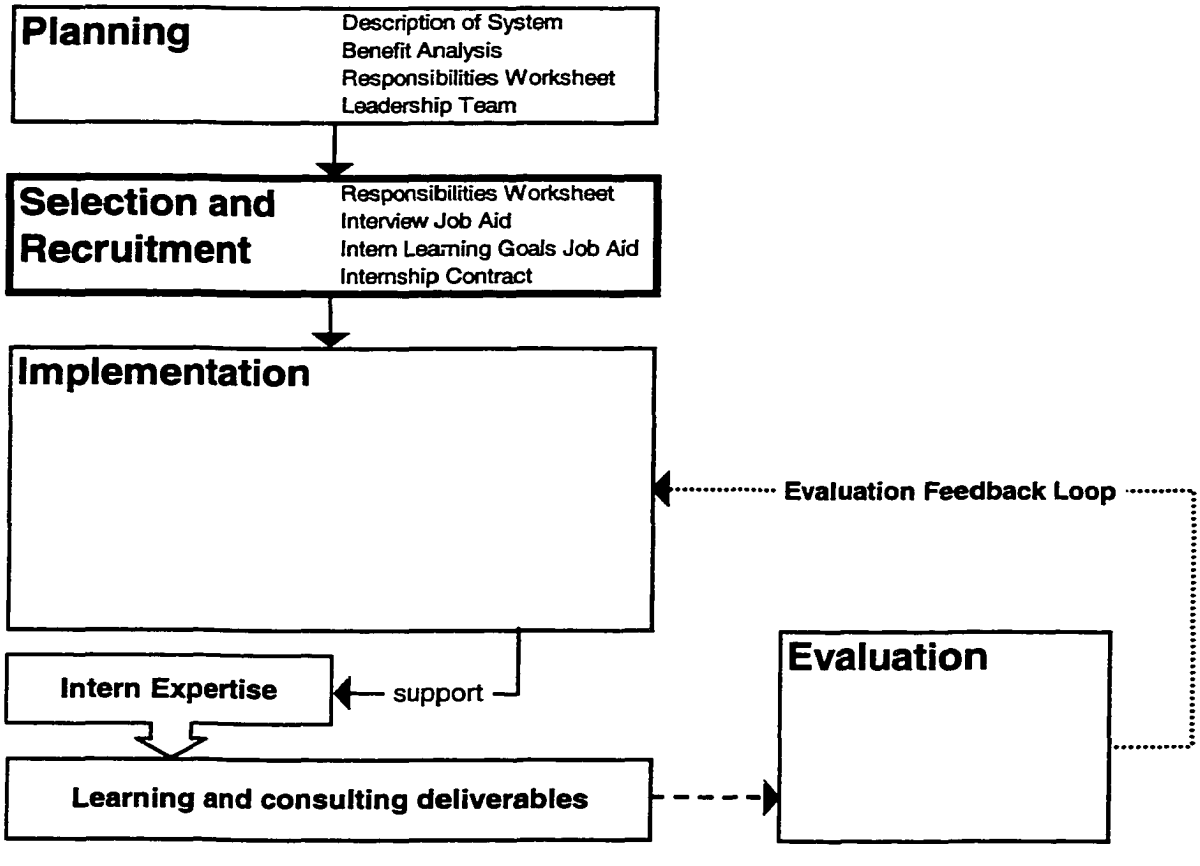


Figure 7. Tools for Intern Selection and Recruitment.

Selection and Recruitment: Intern Responsibilities Worksheet	
Purpose	• Provide interns with list of responsibilities
User(s)	Interns
Outline	• Graduate students to have relevant professional experience and should be able to work with little supervision • Preparing and facilitating meetings, making educational and project-related presentations, conducting performance improvement projects, and collaborating with outside consultants • Establish and maintain good working relationships with elected and appointed officials and all other staff • Spend one or two hours per week on reading materials provided by sponsor or faculty advisor • Document learning activities with sponsor and faculty advisor • Conduct evaluations toward the end of their internships • Outgoing interns will familiarize incoming interns with the PCIS tools and with status of current performance improvement projects

Selection and Recruitment: Interview Job Aid	
Purpose	• Prepare sponsor and intern for PCIS job interview
User(s)	Sponsor Intern
Outline	• Consulting interview in which client (i.e., sponsor) describes problem to consultant (i.e., intern) • Sponsor states expectations with respect to intern performance and how the PCIS fits within the county organization. • Interns to show samples of past consulting work and/or relevant academic course work • Provides interns the opportunity for a real world interview in which they demonstrate to the sponsor-client why they are qualified to do HPT consulting in county government • Sponsor and intern discuss thesis or dissertation projects and explain how county can benefit from and contribute to project

Selection and Recruitment: Intern Learning Goals Job Aid	
Purpose	• Support interns in developing learning goals for PCIS internship
User(s)	• Intern
Outline	• Guide interns through internship • Review goals with sponsor and faculty advisor • Goals be used for evaluation of internship • Set aside one or two hours per week for learning activities such as reading materials provided by sponsor or faculty advisor to keep interns from placing learning on back burner

Selection and Recruitment: Internship Contract	
Purpose	• Commit interns and sponsor to internship
User(s)	Sponsor Intern
Outline	• Includes intern learning goals • Includes sponsor-provided resources and incentives

Implementation:
Tools for Supporting Individual Internships

With the signing of the Internship contract sponsor and intern begin their professional relationship. At this point, the internship system enters into its implementation and evaluation phases. The outgoing intern will familiarize the incoming intern with the PCIS tools and with the status of current performance improvement projects. Figure 8 shows the processes and support tools for the implementation. They are divided into two categories: (1) tools that support individual internships and (2) tools that link internships together into a progressive

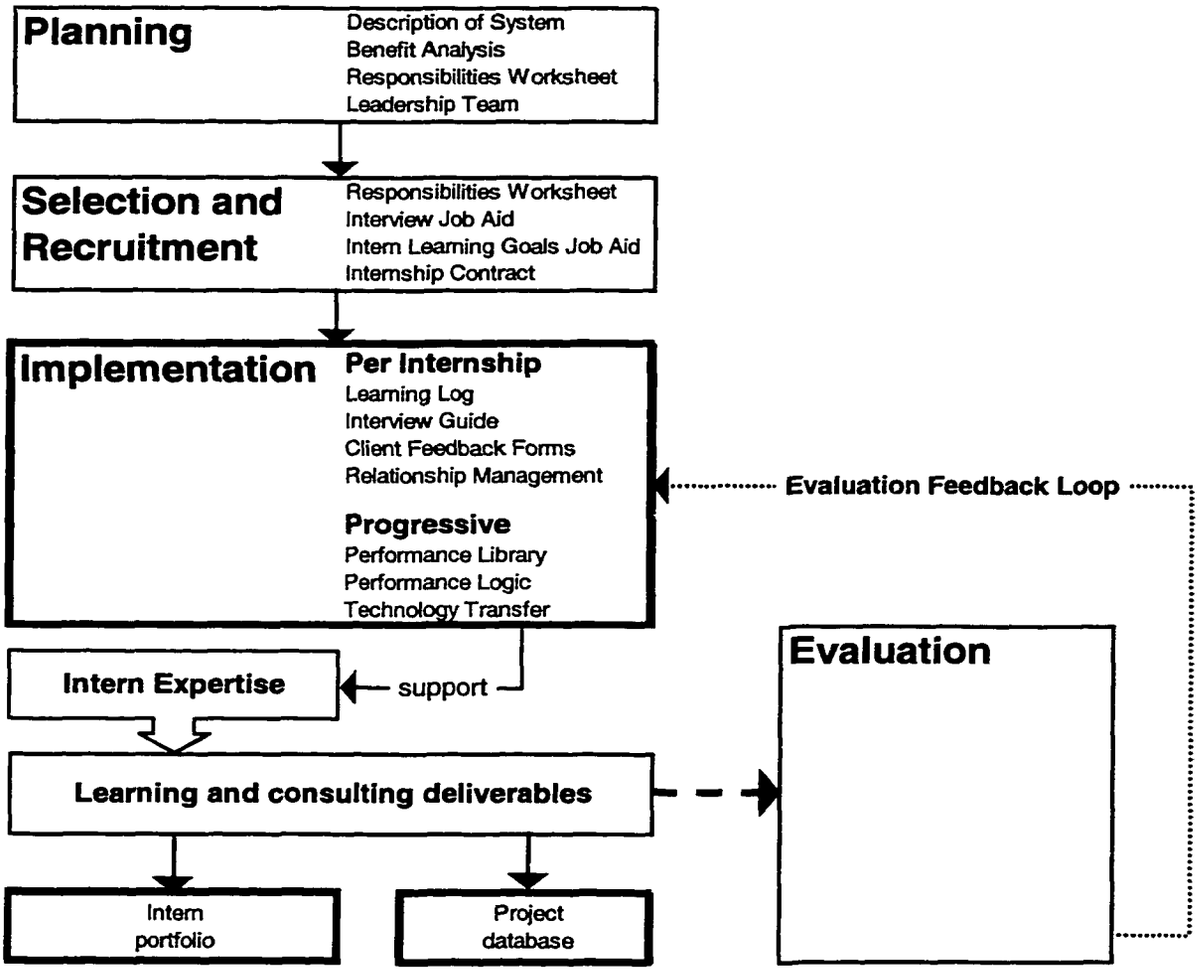


Figure 8. Processes and Support Tools for Implementation.

learning and consulting system. Tools that **support** individual internships are designed to be non-progressive self-contained means of providing interns with a learning and feedback mechanism. Tools that **connect** individual internships are designed to create a progressive learning and consultative system.

Tools supporting individual internships consist of the (1) the learning log, (2) the client interview guide, (3) the client feedback forms, (4) the relationship management tool, and (5) the intern portfolio.

Per Internship: Learning Log	
Purpose	• Record specific events for discussion with sponsor and faculty advisor
User(s)	Intern

Outline	• Consulting events that supports intern's current understanding of HPT and county government
	  • Example: Interns apply a specific HPT tool for the first time or in a new setting and record "This tool generated the same results in county government as in the private sector"
	• Questions interns discuss with sponsor and/or faculty advisor
	  • Example: "How did County X implement a performance improvement plan in only three years?" or "What do you consider the bottom line for county government?"
	• Learning product are entries in learning log

Per Internship: Client Interview Guide	
Purpose	• Interns view staff and departments as performance systems
User(s)	Intern
Outline	• Interview questions address purpose, accomplishments, goals, customers, and customer benefits • Introduces interns to clients and clients to interns. • Allows interns to get a fast understanding of the formal, and often also the informal, organization. • Learning product are completed interview guides

Per Internship: Client Feedback Forms	
Purpose	• Provide interns with client feedback as they develop relationships and position themselves as internal consultants
User(s)	Intern
Outline	**Meeting Feedback Form** • Consultations that consist of a single meeting • Beginning of a project **Project Feedback Form** • For end of a project or completion of a significant project milestones • Learning product are completed feedback forms • Provide interns with staff perceptions about what worked well (and should be continued), and about what can be improved. • Interns model that feedback is an important aspect of performance improvement

Per Internship: Relationship Management	
Purpose	• Build and manage relationships with key stakeholders and clients
User(s)	Intern
Outline	• Consulting is a relationship business • Prompts busy interns to stay in touch with key players on a regular, perhaps monthly, basis • Lists names of staff interns interact with frequently and things staff like to talk about (e.g., county work, family, hobbies, performance improvement) • Interns enter date(s) of interactions with each person • Track staff's acceptance of and transfer of performance improvement technology • Includes tips on establishing and maintaining relationships

Per Internship: Intern Portfolio	
Purpose	• Used for evaluation at end of internship • For future job interviews to demonstrate the array of projects interns conducted in county government.
User(s)	Sponsor Faculty Advisor Interns
Outline	• Prompt interns to begin collecting deliverables early in the internship when it can be done without a high response cost rather than toward the end when too much time may be spent on finding and collecting relevant documents • Interns collect samples of work throughout internships to document learning and consulting and to "demonstrate mastery" • Includes learning and consulting deliverables, performance improvement data, newsletter articles, presentations, completed client feedback forms, reports written by the intern, and other products generated during the internship

Implementation:
Tools for Connecting Internships Into a Progressive System

The progressive consultative internship system must also provide tools to connect individual internship to form the progressive learning and consulting system described earlier. To achieve this purpose, the PCIS includes the following three tools: (1) the performance improvement library, (2) the county performance logic, (3) the technology transfer tracking form, and (4) the project database (Figure 8).

Connect Internships: Performance Improvement Library	
Purpose	• Provide growing information for intern learning and intern consulting
User(s)	Interns
Outline	• Information relevant to intern learning and intern consulting • Information to orient intern to county organization (e.g., mission and goals, organization chart, descriptions of departments, contact information for key officials, office procedures) • Interns add items to library related to county government performance improvement and measurement, benchmarking • As library grows, new interns begin internship with a "running start" as they draw from past interns' experiences • County staff can utilize performance improvement library

Connect Internships: County Performance Logic	
Purpose	• Identify and understand performance variables enables organizations to manage them intelligently
User(s)	Interns
Outline	• Identify one or two key variables per project • Link variables to county's and department's strategic plans • Develop map over time as interns add variables and departments • Review new variables with client, sponsor, and faculty advisor • Develop project-related measurement systems tracked by staff and interns

Connect Internships: Technology Transfer Tracking Form	
Purpose	• Track transfer of technology from intern to staff as interns introduce performance improvement technology into the county organization
User(s)	Sponsor Faculty Advisor Interns
Outline	• List the tool or process used by staff • Describes how staff learned about applying tool or process and project's outcome • Part of the performance improvement library • Evaluate progress of internship system

Connect Internships: Project Database	
Purpose	• Track information about PCIS projects and their status so that future interns and county staff can use it as a resource
User(s)	Sponsor Faculty Advisor Interns
Outline	• Links project's goals and objectives to key performance measures and the method used to obtain these goal and objectives • Interns add to project database as they begin projects • Enables subsequent interns to quickly familiarize themselves with county's past performance problems and solutions • Used for each intern's year-end evaluation • Eventually, sponsor may decide to track all county / department improvement projects to gain comprehensive overview of performance improvement expertise developing within organization

Evaluation

The evaluation of intern performance and PCIS performance occurs in three phases (Figure 9). The **continuous** evaluation assesses intern learning and consulting throughout each internship; the **end-of-internship** evaluation assesses intern learning, organizational performance improvement, transfer of HP technology,

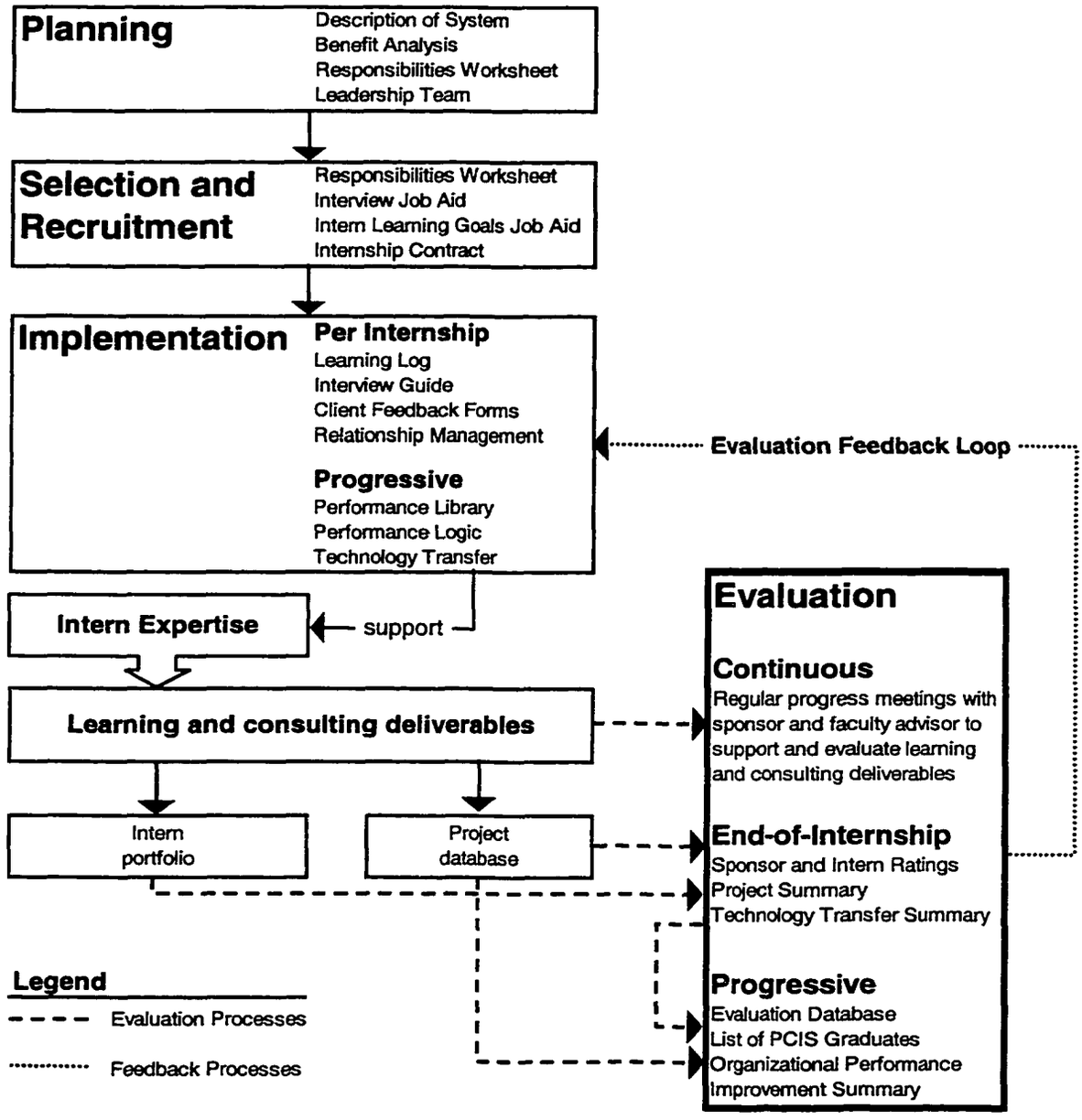


Figure 9. Processes and Tools for Evaluation.

and the PCIS support system; and the **progressive** evaluation tracks interns' career success and the progressive development of the sponsoring county's organizational performance improvement.

Continuous Evaluation

Evaluation: Progress Meetings with Sponsor (two per month)	
Purpose	• Support and evaluate intern performance with respect to learning and consulting
User(s)	Sponsor Interns
Outline	• Allow interns to interact with sponsor in consultant-client relationship • Review learning log • Interns brief sponsors on progress improvement projects • Sponsor may prioritize projects, allocate resources, or ask questions about interventions • Ability to translate HPT jargon into organization's language is important for interns' success now and for professional careers

Evaluation: Progress Meetings with Faculty Advisor (two per month)	
Purpose	• Support and evaluate intern performance with respect to learning and consulting
User(s)	Faculty Advisor Interns
Outline	• Involves review of products from support tools and project deliverables • Reviews items intern wishes to add to performance improvement library and county performance logic • Faculty advisor evaluates intern progress: Does the intern apply familiar tools in new settings? Does the intern apply new tools? Does the intern select the appropriate intervention? Is the intern making progress with relationship building and with the performance logic? Does the intern read relevant literature? Can the intern talk about this literature and the county projects in a way that shows an understanding of the application of HPT principles and tools? Discuss problems such as difficulties with sponsor or staff support • Faculty advisor should encourage interns to solve problems as independently as possible to prepare interns to deal with similar problems in future career

End-of-Internship Evaluation

This evaluation occurs at the end of each internship. Its purpose is to assess intern and sponsor perception of the quality of intern performance. It also provides a quantitative summary of the intern's transfer of technology and the intern's overall contributions to organizational performance improvement. Specific end-of-internship evaluation tools are (1) intern evaluation and sponsor rating forms, (2) the project summary form, and (3) the technology transfer summary.

Evaluation: Sponsor and Intern Rating Forms	
Purpose	• Assess perception of the quality of the internship
User(s)	Sponsor Interns
Outline	• Sponsor and intern rate on a scale from 1 to 3 if the internship met their expectations 3 = exceeded expectations 2 = met expectations 1 = did not meet expectations

Sponsor	**Interns**
Quality of the intern's progress meetings; facilitation of meetings; follow-up to meetings	Sponsor was accessible
Intern provided fresh ideas and suggestions for performance improvement	Sponsor recommended readings and other resources
Intern's communicated well with leadership team members / other department heads and officials / line staff	Sponsor offered training opportunities
Intern completed projects on time	Sponsor assigned challenging projects
Overall, how do you value intern's expertise?	Sponsor provided feedback about my performance
Intern made good use of the information you provided (county government, public sector performance improvement, etc)	The progress meetings were helpful
Intern showed an understanding of how your organization operates	Sponsor provided clerical support
Intern kept me informed about performance improvement projects throughout the organization	I accomplished my learning goals
	I learned a lot from doing the projects
	I received support from the staff
	I felt accepted as member of the organization.
	Project load was manageable
	Overall, I am satisfied the internship at the interning organization.

Evaluation: Project Summary Form	
Purpose	• Track organizational performance improvement for the specific internship and across internships.
User(s)	Interns
Outline	• Use project database • Create a history of all projects conducted by the current intern, including the continuation of previous interns' projects • List projects, identify whether assigned or requested, performance measures in place now that were not in place before, intervention, performance improvement data • Indicate with how many departments intern worked and how many projects involved interdepartmental or county-wide processes • Compare information with quantitative summaries of previous interns

Evaluation: Technology Transfer Summary	
Purpose	• One-page summary of interns' accomplishments with respect to transferring performance improvement technology to county
User(s)	Interns
Outline	• List performance improvement tools, when used, and when staff used it • Evidence of successful transfer of technology may not become evident during a single internship; therefore, technology transfer will be assessed across internships through long-term evaluations

Progressive Evaluation

The purpose of the progressive evaluation is to track whether the system achieves its purpose of connecting intern learning and organizational performance improvement in the long-term. It consists of (1) the evaluation database, a list of PCIS graduates, and (3) the organizational performance improvement summary.

Evaluation: Evaluation Database	
Purpose	• Track individual end-of-internship evaluations.
User(s)	Sponsor Faculty Advisor Interns
Outline	• Contains sponsor and intern ratings • Contains project history of PCIS evaluation database • Includes all evaluations conducted for the progressive consultative internship system. • Faculty advisor and intern review this database and note trends that indicate an increase or decrease in quality.

Evaluation: List of PCIS Graduates	
Purpose	• Measure success of internship system not only by what each intern accomplishes <u>during</u> internships, but also if they are successful <u>afterwards</u>
User(s)	Faculty Advisor Interns
Outline	• Tracks previous interns' name, dates of internship, university graduation date and degree, and post-graduation positions held • Collect information via brief e-mail surveys • Previous interns are free to indicate their current salary • Although more variables than a one-year internship contribute to job success, the first job may well determine the direction of an intern's entire career. • Faculty advisor may use this database to recruit students into the internship system or the department.

Evaluation: Organizational Performance Improvement Summary	
Purpose	• Track progression of organizational performance improvement across internships
User(s)	Sponsor Interns
Outline	• Summary traces performance improvement consulting outcomes back to the first intern • Interns use project database, the county performance logic, and end-of-internship evaluation database • Shows how projects develop from "putting out fires" to establishing model change processes that enable county staff to prevent fires by supporting good performance and planning continuous performance improvement • For an outsider's perspective, the faculty advisor may ask colleagues to evaluate if the PCIS projects show a trend to more important and systemic projects over time.

Summary of Tools

Tool	Purpose
Planning	
Description of Internship System	Interest potential users in setting up the progressive consultative internship system
Benefit Analysis Worksheet	Determine if PCIS can address specific short-term and long-term performance improvement needs in county organization
Sponsor and Faculty Responsibilities Worksheet	Provide sponsors and faculty advisors with list of their PCIS responsibilities
Performance Improvement Leadership Team	Support the sponsor's commitment to performance improvement within the county organization Support intern
Intern Selection and Recruitment	
Intern Responsibilities Worksheet	Provide interns with list of their PCIS responsibilities
Interview Job Aid	Prepare sponsor and intern for PCIS job interview
Intern Learning Goals Job Aid	Support interns in developing learning goals for PCIS internship
Internship Contract	Commit interns and sponsor to internship
Implementation: Tools for Supporting Individual Internships	
Learning Log	Record specific events for discussion with sponsor and faculty advisor
Client Interview Guide	Interns view staff and departments as performance systems
Client Feedback Forms	Provide interns with client feedback as they develop relationships and position themselves as internal consultants
Relationship Management	Build and manage relationships with key stakeholders and clients
Intern Portfolio	Used for evaluation at end of internship For future job interviews to demonstrate the array of projects interns conducted in county government.

Tool	Purpose
Implementation: Tools for Connecting Internships	
Performance Improvement Library	Provide growing information for intern learning and intern consulting
County Performance Logic	Identify and understand performance variables enables organizations to manage them intelligently
Technology Transfer Tracking Form	Track transfer of technology from intern to staff as interns introduce performance improvement technology into the county organization
Project Database	Track information about PCIS projects and their status so that future interns and county staff can use it as a resource
Continuous Evaluation	
Progress Meetings with Sponsor and Faculty Advisor	Support and evaluate intern performance with respect to learning and consulting
End-of-Internship Evaluation	
Sponsor and Intern Rating Forms	Assess perception of the quality of the internship
Project Summary Form	Track organizational performance improvement for the specific internship and across internships.
Technology Transfer Summary	One-page summary of interns' accomplishments with respect to transferring performance improvement technology to county
Progressive Evaluation	
Evaluation Database	Track individual end-of-internship evaluations.
List of PCIS Graduates	Measure success of internship system not only by what interns accomplishes during internships, but also if they are successful afterwards
Organizational Performance Improvement Summary	Track progression of organizational performance improvement across internships

Summary of Design

The progressive consultative internship system differs from traditional internships in that it attempts to balance between services the organization provides for the intern (i.e., learning opportunities and resources) and the services interns provide for the organization (i.e., performance consulting). Typically, internship programs are built around the time frame of individual internships. The present internship system goes beyond this time frame as it supports its users in a long-term performance improvement effort.

The purpose of the progressive consultative internship system is to connect intern learning and organizational performance improvement. It is based on the two assumptions that interns can effectively contribute to long-term organizational performance improvement in county government and that this performance improvement can be achieved by linking consecutive internships into a progressive learning support and consulting system. The PCIS provides processes and tools that connect individual internships into a cohesive long-term consulting effort that will eventually encompass the entire county system.

Appendix P

Cover Letter Accompanying Evaluation Packet

Date

Participant's Name
Address 1
Address 2

Dear _____!

Thank you very much for being willing to participate in my dissertation research. I appreciate your collaboration on this project.

Per our earlier conversation, I have enclosed the following material:

1 Design specifications
2 Evaluation questionnaire
Please read the design specifications and use the evaluation questionnaire to evaluate the design from the perspective of a prospective sponsor (*faculty advisor, intern*). I will use your evaluation in my dissertation for suggesting design improvements.

3 Consent to participate
This form is required and approved by Western Michigan University's Human Subjects Institutional Review Board. Please sign and return it with the answered evaluation questionnaire.

4 $20 gift certificate for *Barnes & Noble*
A token of my appreciation. You may keep it even if you decide to stop participating.

5 Self-addressed stamped envelope
Please return with questionnaire and signed and dated consent form.

For this evaluation, please set any personal bias aside. It is important that you render a professional judgment as objectively as possible. Thank you!

Best regards,

Peter-Cornelius Dams

Appendix Q

Consent to Participate in Evaluation

WESTERN MICHIGAN UNIVERSITY
H. S. I. R. B.
Approved for use for one year from this date:
DEC 13 2000
x Michael A. Pritchard
HSIRB Chair

Western Michigan University
Department of Psychology
Principal Investigator: Dale M. Brethower, Ph.D.
Student Investigator: Peter-Cornelius Dams, MS

I have been invited to participate in a research project entitled *A Systems Approach to Designing an Internship Model that Benefits the Interning Organization.* This project is conducted by Dr. Dale M. Brethower and Peter Dams from Western Michigan University, Department of Psychology. This project is part of the dissertation requirements for Peter Dams.

The purpose of this project is to design a performance consulting internship system for county governments. This internship system would provide county governments with a cost-effective alternative to expensive outside consultants and to the time-consuming approach of utilizing only county staff.

I have been asked to evaluate the design of this internship system by reviewing the design document, answering the evaluation form, and returning it in the provided self-addressed stamped envelope. I do not have to answer all questions on the evaluation form.

I have been asked to render an objective professional judgment of the design of this internship system. The outcome of this evaluation will have no bearing on the outcome of the dissertation; that is, the dissertation can be successful regardless of my answers. To compensate for the time it takes to participate in this evaluation, I will receive a gift certificate worth $20.

The information on the evaluation form is confidential. My name will not appear on any papers on which this information is recorded. The evaluation form is coded, and Peter Dams will keep a separate master list with the names of participants and the corresponding code numbers. Once the data are collected and analyzed, the master list will be destroyed. All other forms will be retained for at least three years in a locked file cabinet in the principal investigator's office.

As in all research, there may be unforeseen risks to the participant. If an accidental injury occurs, appropriate emergency measures will be taken; however, no compensation or treatment will be made available to me except as otherwise specified in this consent form. I may withdraw my consent to the research or may not complete the evaluation at any time without prejudice or penalty.

If I have any questions or concerns about this study, I may contact either Dr. Brethower (520-615-3524), Peter Dams (616-372-7555), the Chair of the Human Subjects Institutional Review Board (616-387-8293) or the Vice President for Research (616-387-8298).

WESTERN MICHIGAN UNIVERSITY
H. S. I. R. B.
Approved for use for one year from this date:

DEC 13 2000

x Michael A. Pritchard
HSIRB Chair

This consent document has been approved for use for one year by the Human Subjects Institutional Review Board as indicated by the stamped date and signature of the board chair in the upper right corner. Subjects should not sign this document if the corner does not have a stamped date and signature.

My signature below indicates that I have read and/or had explained to me the purpose and requirements of the study and that I agree to participate.

Signature _____ Date _____

Appendix R

Feedback Form for CQI Rollout Presentations

KALAMAZOO COUNTY GOVERNMENT

County Wide Continuous Quality Improvement (CQI)

CQI PRESENTATION FEEDBACK

Date: _____

A key ingredient of continuous quality improvement is feedback from customers. You are our customer today. Your honest feedback is important in helping us improve this presentation.

Circle the answer that best reflects your opinion. We welcome additional comments for questions five and seven.

	Disagree			Agree
1. The presentation gave a broad picture of the County's plans for implementing CQI.	1	2	3	4
2. I found the presentation interesting and helpful.	1	2	3	4
3. I would like to learn more about using CQI in my job.	1	2	3	4
4. I support the County wide CQI program.	1	2	3	4

5. The department I work in already uses some of the ideas presented today. Yes No

If yes, please give one or two examples:

6. In which County Department/Unit do you work?

_____

7. Do you have any additional comments?

Appendix S

CQI Information Brochure Distributed During County-Wide CQI Rollout

Why CQI at Kalamazoo County?

Increasingly, people expect from county government what they are already getting from businesses: More effective and more efficient services. Therefore, County Government must be able to:

- Meet and exceed citizen expectations . . .
- While fulfilling our state and federal mandates . . .
- Quality services with the same or fewer overall resources . . .
- All this in a community that is constantly changing

CQI Focuses on Improving Processes

- Reduce errors and waste
- Save time and resources
- Improve customer service

What's in it for you?

Improving work processes . . .

- Helps you get your job done
- Improves your relationship with your internal and external customers
- Makes your job more enjoyable and satisfying

Continuous

CQI is a process, not a one-time effort. It is successful when people, departments, and organizations continuously get better at what they are doing.

Quality

Quality refers to the service we provide to our internal and external customers.

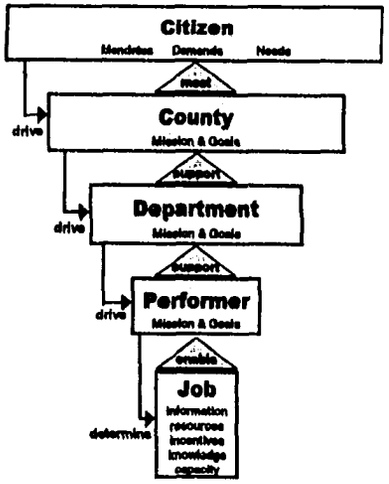
Improvement

Improving how we're doing business now, whether its faster, better, or less expensive.

CQI Resources

- *Departmental Self-Study*
  Get your department jump-started on the road to CQI
- *Inventory of Internal CQI Expertise*
  Utilize other county departments for CQI ideas and support
- *CQI Grants Program*
  Financial support to help you make your CQI ideas become reality
- *Seven Habits Training*
  Become more effective in your personal and professional life

CQI Connects Your Job to the Citizens

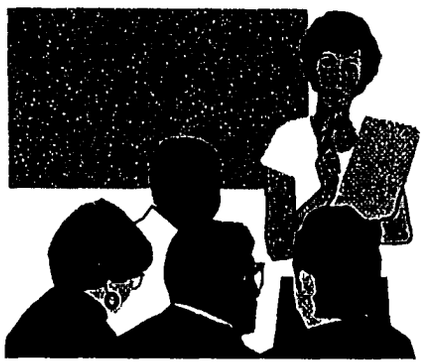


Examples of CQI Projects

- Customer surveys at Clerk/Register
- Hiring teams at the Office of Prosecuting Attorney
- Cross-functional teams at HSD
- Team-based decision-making at MSU Extension
- Process mapping for integrating the County's criminal justice system
- Airport's Environmental Management Systems to prevent pollution and protect the environment

CQI Steering Team

Beach, Jenny	HRD	383-8998
Bourgeois, Chris	OPA	385-6063
Dams, Peter	Admin	383-6449
Hein, Dale	HSD	373-5247
Kalafut, Grace	OCC	387-7043
Nieuwenhuis, Ann	MSUE	384-8057
Nitz, Don	Juv. Home	385-8577
Russell, Greg	OPA	383-8900
Sharp, Ed	Parks	383-8778
Shull, Tom	Sheriff	383-8727
Slade, Doug	Circuit Ct	384-8073
Solik, Beverly	HSD	373-5262
Terronez, Randy	Admin	384-8087



CQI Mission

To enable all Kalamazoo County employees to effectively and efficiently work toward achieving the County's mission and goals.

County Mission

To provide responsive, innovative, and cost effective services.

CQI Goals

County CQI strives to achieve its mission by creating a workplace that provides all employees with:

1. *Information* necessary for excellent performance.
2. *Tools and resources* necessary for excellent performance.
3. *Timely and meaningful recognition* for their performance.
4. *Knowledge, skills, and attitudes* necessary for excellent performance.
5. A way to match each individual's *capacity and potential* to his/her job.

10/00

KALAMAZOO COUNTY GOVERNMENT

Continuous Quality Improvement
County
CQI

COUNTY WIDE

CONTINUOUS QUALITY IMPROVEMENT

Appendix T

Job Aid for Writing Quality Improvement Success Stories

County Connection Newsletter

Tips for Writing *Quality Improvement Success Stories*

What readers want to know about your CQI success story . . .

Questions to get you started	Possible answers or areas to clarify
What was the reason for your improvement project?	• Tired of hearing "We've been doing this for 128 years!" • Taking hassles out of what you're doing • Identify who your real customers are • Customer or employee suggestions/complaints • Saving time or money or both • Reducing errors or waste • Potential to save money or other resources
What were some concerns when you began the project?	• How did staff feel about it? • What was management's reaction?
How did you decide on the solution? **Who did you work with?**	• Did an internal / external consultant help you? • Did you read about it? Did you receive training or attend a workshop? • Did colleagues or other departments help you? (If so, give credit)
What are some of the benefits of the improvement project for *you and your department*? **How does it help you, your staff, your department do your job?**	• You know who you're internal and external customers are • You have teams who get things done • You have a mission / purpose statement to guide your work / your department • You save time by having fewer steps in a process / you don't have to wait for umpteen approvals • You avoid duplication of effort, such as entering data that had been entered by someone else in your department or in another department
What are the benefits to the *customers* of your department	How do . . . other county employees citizens other units of local or state government benefit from your improvement?
What are other indirect benefits?	• Better job descriptions • Less overtime • Less last-minute changes • Improved morale
What can you or are you doing to further improve the process?	• Describe some of the bugs you're trying to work out • Have other departments expressed interest in what you've done? • What are other improvement projects you plan to work on next?

Appendix U

List of Newsletter Articles Written by CQI Steering Team Members

Date	Article Title	Author(s)
September 1999	Steering Team Begins County-Wide Quality Improvement	Peter-Cornelius Dams, CQI Coordinator
October	Some CQI Basics	Peter-Cornelius Dams, CQI
November	Success Stories from OPA	Margo Rinehart & Chris Keith, Office of the Prosecuting Attorney
December	Two Stories About Customer Feedback	Laurie Allan, MSU Extension; Kerrie Hall & Nancy Skocelas, Office of the Prosecuting Attorney *(all not on CQI Steering Team but directed by team members from their departments to write articles)*
January 2000	How HSD is Using CQI	Dale Hein, Human Services Department
February	The Path to CQI for MSU Extension	Ann Nieuwenhuis, MSU Extension
March	It's About More than "Just" the Customer	Ed Sharp, Parks and Recreation
April	County CQI Mission and Goals - Part 1 New Look for County Organization Chart	Randy Terronez, Administration, & Peter Dams, CQI Coordinator Peter Dams, CQI Coordinator
May	County CQI Mission and Goals - Part 2 Clerk/Register CQI Success	Randy Terronez, Administration, & Peter Dams, CQI Coordinator Sharon Eshlaman, Clerk/Register
June	Survey Says!	Jenny Beach, Human Resources
July	CQI Tool Supports Improvement of Criminal Justice System CQI Steering Team Announces CQI Grants Program	Peter Dams, CQI Coordinator Peter Dams, CQI Coordinator
August	CQI and the Sheriff's Department. Seven Habits Evaluation CQI Team offers $ for Quality Improvement	Tom Shull, Sheriff Peter Dams, CQI Coordinator Peter Dams, CQI Coordinator

Date	Article Title	Author(s)
September	Seven Habits: Participant's Perspective	Tom Shull, Sheriff
	CQI Team Welcomes New Member	Greg Russell, Office of the Prosecuting Attorney
October	Let CQI Begin!	Don Nitz, Juvenile Home
November	Performance Measurement	Bill Dundon, Finance (Chair, Performance Measurement Team)
	How does Performance Measurement fit with Continuous Quality Improvement and Seven Habits?	Peter Dams, CQI Coordinator
December	Response to County-Wide CQI	Beverly Solik, Community Health Bureau (HSD), and Peter Dams, CQI Coordinator

Appendix V

Application Packet for CQI Grant Requests

Kalamazoo County Government

CQI Grants Program
Grant Application

Requesting department _____ Date _____

Staff contact _____ Phone _____

Department Head Signature _____ Phone _____
(required)

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1. How does your CQI funding request align with the County's CQI Mission? (See attached *At a glance: County CQI Mission and Goals*)

2. Which of the five CQI Strategic goals does your request directly address? (See attached). How will your proposed project meet these goals?

3. Who will be directly and indirectly impacted by the proposed project?

4. How are you going to measure and evaluate the impact of your project to your department, the County's CQI effort, and your department's customers?

5. When is your project's anticipated completion date?

6. Will you be using additional department funds to support your project?

7. Are you collaborating with any other county department(s) on this project? If yes, which one(s)?

8. How much total money do you need to complete your project? How much money are you requesting from the CQI budget? (*Note that grants are capped at $ 2,500 per project.*)

Please return this form to Peter Dams, CQI Coordinator, Board Office.

Kalamazoo County Government

CQI Grants Program
Final Impact Report

Please complete this form at the end of the CQI-funded program and send it to the CQI Coordinator, Board Office. The CQI Steering Team encourages all grant recipients to present project outcomes to the team and interested county employees as part of the county's CQI education efforts. Thank you!

What was your project about? What did you do? How long did it take?

Which of the five CQI Strategic goal(s) does your project address most directly? In what way?

What was the impact of your project on your service quality / your customers and/or staff / your performance? How do you know? How did you measure the difference?

What did you learn? What would you do differently the next time?

At a glance: County CQI Mission and Goals

County CQI Mission	• The mission of county-wide Continuous Quality Improvement ("County CQI") is to enable /all Kalamazoo County employees to effectively and efficiently work toward achieving the County's mission and goals.
County CQI Goals	**What Goals mean (Objectives)**
1. All county employees have the information necessary for excellent performance.	• Know who their internal and/or external customers are • Know customers' needs and what customers do with their services • Know if customers are satisfied • Know how they can improve customer service • Know where to find job-critical information that includes instructions about all critical aspects of their jobs • Know performance standards and expectations • Know the purpose of their job and how they contribute to county & departmental missions. • Know what incentives are provided for good performance • Know what they do right and where they can improve • Get feedback and other job information in a timely manner (from supervisors and customers) (day-to-day; formal monthly) • Supervisors request feedback from employees • Supervisors listen to employees
2. All county employees have the tools and resources necessary for excellent performance.	• Proper equipment and materials • Sufficient staff • Effective cross-functional teams in each department • Performance support systems (job aids, checklists, manuals, online help and support) • Opportunity for training that is job related or considered an incentive / benefit • Flex time system in place • Procedures and work flow are logical • Time to complete task • Humor in the workplace • Processes for improving effectiveness and efficiency of departmental and county-wide procedures
3. All county employees receive timely and meaningful recognition for their performance.	• Recognition from supervisor (positive reinforcement) • Personal development opportunities • Professional development opportunities • Performance (Merit) based pay • Other incentives and rewards within budgetary and legal limitations
4. All county employees have the knowledge, skills, and attitudes necessary for excellent performance.	• Know what to do, how to do it, and why to do it • Know how to deal with the Public • Model principles and values of the organization • Communicate skillfully • Know how to deal with job tools and techniques
5. All county employees have jobs that match their individual capacity and potential.	• Employees handle stressful situations professionally • Work load equal to hours worked

Appendix W

Data Collection Log for Internal Grant Review Process

INTERNAL GRANT REVIEW PROCESS TRACKING FORM - Draft -

Agency	Grant	(O)riginal (R)enewal	Application Sign-Off Dates			Contract Sign-Off Dates			Comments [1]
			Depart.	Admin.	Board	Depart.	Admin.	Board	

[1]Also note grants that went to BOC without being so required: Original grant contracts that did not change from application (this is still requiring BOC ratification)
Renewal grant applications

Appendix X

Process Steps Eliminated from the Internal Grant Review Process for Original and Renewal Grants per New Grant Review Policy

Approval to Submit

X denotes eliminated step

Step	Department	Process Steps	Original Grant	Renewal Grant
1	Grantee Department	Reviews application per Grant Apploication /Acceptance Review Form form (GAARF)		
2	Grantee Department	Completes grant application		
3	Grantee Department	Memo (Brief) to Board of Commissioners requesting approval to submit grant application		X
4	Grantee Department	Makes three copies of completed application and FTE request, if needed		X
4	Legal Counsel	Reviews GAARF and application, signs GAARF	X	X
5	Human Resources	Reviews GAARF and application, signs GAARF	X 1)	X 1)
6	Finance (Admin. Review)	Reviews GAARF and application, signs GAARF, forwards packet to Board Office		X
7	Board Office	Compile preliminary agenda with grant memo and complete		X
8	Administration	Review preliminary agenda, questions answered		X
9	Executive Management	Executive management reviews preliminary agenda		X
10	Board Office	Holds application and files grant memo with final agenda		X
11	County Board	Reviews agenda and supporting documents (e.g., grant memo)		X
12	County Board	Votes to approve grant application		X
13	Board Chair	Signs all three application copies		X
14	Clerk/Register	Signs all three application copies		X
15	Board Office	Return ALL signed copies to department		X
16	Grantee Department	Mail signed application to granting agency		
		Number of steps remaining (eliminated)	**14(2)**	**3(13)**

X 1) Step occurs only when new position is created

Contract Approval

			Original Grant	Renewal Grant
1	Grantee Department	Review of contract per GAARF		
2	Grantee Department	Completes grant contract		
3	Grantee Department	Memo (Brief) to Board of Commissioners requesting approval of grant contract		
4	Grantee Department	Makes three copies of completed application and FTE request, if needed		
5	Human Resources	Reviews GAARF and contract, signs GAARF	X	X
6	Legal Counsel	Reviews and initials contract		
7	Finance (Admin. Review)	Reviews GAARF and contract, signs GAARF; forwards packet to Board Office		
8	Board Office	Put contract in preliminary agenda		
9	Administration	Review preliminary agenda		
10	Executive Management	Executive management reviews preliminary agenda		
11	Board Office	Holds contract and files memo (brief) with final agenda		
12	County Board	Review contract memo (brief)		
13	County Board	Vote to approve contract (and creation of personnel if required)		
14	Board Chair	Signs contract		
15	Clerk/Register	Signs contract		
16	Board Office	Distributes contract to dept.		
17	Grantee Department	Sends signed contract to funding agency		
18	Grantee Department	Retain photocopy		
19	Grantee Department	Send original contract to Board Office		
20	Board Office	Board Office files contract		
		Number of steps remaining (eliminated)	**19(1)**	**19(1)**

Appendix Y

Data Collection Log for Outbreak Investigation Process

Outbreak Investigation Milestones

(Use for complaint-initiated outbreak investigation)

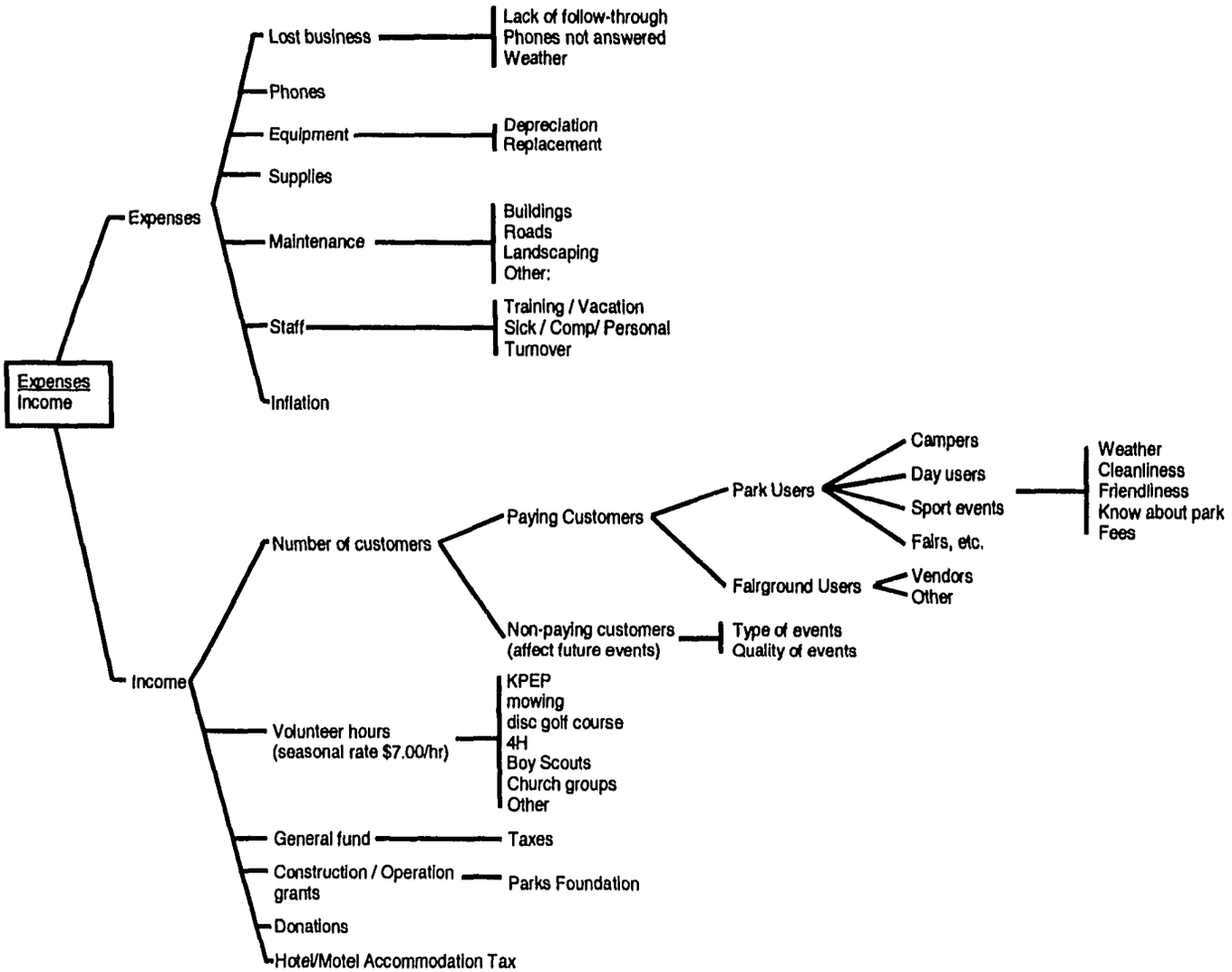
Outbreak: _____

Milestone	Process II	Date	Comments / Findings
Date outbreak occurred	1		
Notification of potential outbreak received	2		
Site visit	5		
Case definition developed	6		
Working hypothesis developed	6		
Complete menu obtained	7		
Complete guest list obtained	7		
Epi Info questionnaires available for interviews	9		
Interviews complete (both sick people and control group)	10		
Guest stool/food samples to Lab or MDCH	16		
Establishment stool/food samples to Lab or MDCH	16		
EpiInfo data analyzed	20		
HSD lab results obtained(bacterial)	21		
MDCH / CDC lab results obtained (viral, toxins)	21		
Possible source identified	22		
Final report completed	23		
CDC Form 52.13 to MDCH	24		
Dates of Outbreak Response Team Meetings	1. 2. 3.	4. 5. 6.	7. 8. 9. 10. 11. Debriefing

Appendix Z

Draft of Parks Logic Diagram

The Parks Logic *(Draft)*



Appendix AA

Data Collection Log for Friend of the Court Phone Staff

Friend of the Court Phone Staff
Customer Service Phone Log

Date: _____ **Staff:** _____

Please make a hash mark for each incident. Use additional log sheets if needed.

Wrong Call	Wrong department in Kalamazoo County			
	Wanted Courts	Wanted Sheriff	Wanted OPA	Wanted Traffic
	Wrong FOC department	Wrong county	Wrong Directory Assistance	Other
Duration of wrong call	0 - 5 minutes	5 - 10 minutes	10 - 15 minutes	15 + minutes
Angry customers (Yelled, screamed, swore, called me names)	Angry when I picked up the phone		Became angry during phone conversation	
Calls referred to other FOC departments	FOC was helpful		FOC was not helpful	
Calls referred to supervisor				
I could not help the customer because . . .				
Other comments				

Appendix BB

Survey Instrument for Seven Habits Evaluation

SURVEY	ALL THE TIME	SOME-TIMES	NEVER
Do you use the Planner/Calendar you received at the 7 Habits workshop?			
Do you use the Compass/Roles and Goals Setter?			
Do you identify your goals and roles on a regular basis?			
Do you plan weekly?			
Do you use your personal mission statement?			

Are you interested in a refresher course on one or several habits? ____Yes ____ No

Please tell us why or how the 7 Habits tools are helping you in your job; or if not, why not:

Please return to Peter Dams in the Board Office via interoffice mail, by Friday, January 14, 2000.

THANKS !

Appendix CC

Kalamazoo Criminal Justice System Felony Case Process Mapping Status Report

AGENCY	Sheriff	City of Kalamazoo	City of Portage	Kalamazoo Township	Prosecuting Attorney	District Court	Circuit Court	DOC Probation / Parole	Community Corrections
REPRESENTATIVE	Capt. Bill Timmerman	Capt. Rob Simpson	Capt. Kit Lirot	Capt. Tim Bourgeois	Bob Pangle, Chief Assistant Prosecutor	Tina Keifer, Deputy Administrator	Doug Slade, Acting Administrator	Dick Crites, Probation Supervisor	Grace Kalafut, Director
Initial Meeting	14-Jun-2000	16-Jun-2000	08-Jun-2000	23-Jun-2000	29-Jun-2000: exist. map to Peter Meeting: 30-Jun	~~31-Jul-2000~~ 10-Aug-2000	16-Aug-2000 Up to settlement conference	14-Aug-2000	~~08-Aug-2000~~ 19-Sep-2000
Draft 1 to agency for review	06-Jul-2000	06-Jul-2000	14-Jun-2000	05-Jul-2000	05-Jul-2000	17-Aug-2000	21-Aug-2000	18-Aug-2000	Sep-25-00
Review meeting at agency	n/a	n/a	19-Jun-2000	26-Jul-2000	n/a	07-Sep-2000	30-Aug-2000 Review part 1 and up to sentencing	n/a	n/a
Revisions returned to Peter Dams, CQI Coordinator	04-Oct-2000	15-Sep-2000	n/a	n/a	12-Jul-2000	07-Sep-2000	n/a	22-Aug-2000	12-Oct-2000
Draft 2 to agency for review	05-Oct-2000	26-Sep-2000	02-Aug-2000	02-Aug-2000	17-Jul-2000	14-Sep-2000	11-Sep-2000	13-Sep-2000	12-Oct-2000
Draft 2 revisions to Peter Dams	Recv'd: 09-Oct Meeting: 13-Oct	13-Oct-2000	**No further changes**	24-Aug-2000	**No further changes**	05-Oct-2000	20-Sep-2000	05-Oct-2000	25-Oct-2000
Draft 3 to agency for review	17-Oct-2000	16-Oct-2000		13-Sep-2000		09-Oct-2000	28-Sep-2000	06-Oct-2000	26-Oct-2000
Draft 3 revisions to Peter Dams	25-Oct-2000	**No further changes**		13-Oct-2000		**No further changes**	11-Oct-2000	12-Oct-2000	30-Oct-2000
Draft 4 to agency for review	26-Oct-2000			13-Oct-2000			12-Oct-2000	**No further changes**	**No further changes**
Draft 4 revisions to Peter Dams				**No further changes**			08-Nov-2000		
Draft 5 to agency for review							09-Nov-2000		
Draft complete per agency's process mapping team			02-Aug-2000		17-Jul-2000			12-Oct-2000	
Approval by DH/EO or designee	30-Nov-2000	17-Oct-2000	11-Oct-2000	15-Nov-2000	17-Jul-2000	01-Nov-2000	14-Dec-2000	18-Oct-2000	31-Oct-2000

Next steps	

Appendix DD

Mid-internship Feedback Form for Author's Internship

INTERNSHIP FEEDBACK
Peter-Cornelius Dams

This evaluation is divided into three parts:

1. Specific progress evaluation with respect to the projects you assigned to me
2. Evaluation of my professional competence
3. Overall evaluation and suggestions for improvement

Please complete each part of the evaluation. We will discuss this evaluation at our 2/9 meeting.
Thanks, Peter

SPECIFIC PROGRESS EVALUATION

Please comment on the progress of the following specific projects assigned to Peter at the beginning of his internship:

3 **progress exceeds expectations**
2 **progress meets expectations**
1 **progress doesn't meet expectations**
Please add specific comments as needed

Projects	**Accomplishments Deliverables**	**Eval**
Continuous Quality Improvement Program		
Interview each team member	• Initial team completed 8/13/99; Ed Sharp and Penny Wentzel interviewed as they joined the team	
Prepare summary of past county department efforts and "areas of expertise"	• Interviewed all department heads and elected officials by December 20, 1999 • Collected "success stories" and CQI efforts • Next step: complete inventory	
Contact other public sector initiatives: in Kalamazoo area, Jackson/Grand Traverse Co, Washtenaw Co; schedule joint meeting with our team	• Met with Laurie Allen Russell (CMH Quality Director); attended CMH board meeting; Laurie agreed to speak to team • Bob Guenzel (Washtenaw) presented, January 5, 2000	
Develop "master plan" (strategic plan)	• Conducted planning exercises (e.g., the county as a system, biggest performance block) • Goals and subgoals developed by 2/2/2000	
Develop interface with HR (possible training track)	• Union membership issue • 7 Habits survey • CQI survey	

Generally serve as "champion" for Quality Team (i.e., coordinate meetings, etc.) (help with agenda, write agenda, schedule room)	• coordinate meetings • prepare agendas and minutes • conducted learning exercises • Newsletter articles since September 1999 with different authors • Monthly reports to DH/EOs • CQI Update to Board of Commissioners (1/4/2000) • Support CQI Survey team (ongoing)	
Support departments in CQI efforts	• Community Health Profile (Beverly Solik and Darrell Rodgers; ongoing) • Outbreak Response Team (Darrell Rodgers; ongoing) • Parks Department: Work with Ed Sharp to introduce CQI (ongoing) • Meeting with MSU-E supervisor re. employee morale (one meeting)	
Southwest Michigan Quality Council ▪ Meet with Anne McCreary, SMWQC/Chamber of Commerce ▪ Follow up on Public Sector group/Ann Nieuwenhuis	• attended Lunch-n-Learn programs • coordinated exhibit at SWMQC conference • attended Chamber reception for new Chamber President John Long • Public sector group in flux right now; no immediate priority	
Prepare assessment of Covey Training (with Dale Hein)	• Supported survey development, using tools • Evaluated Franklin/Covey's evaluation instrument • Completed survey and compiled data • Statistical analysis (ongoing)	
Specific projects for which Randy gives cue		
Strategic Planning Goal / Issue (county has teams established, use Lyle Sumek's white Board binder, Part V, Section D	• Working with Grant review team (ongoing) • Met with all other team chairs • Attended 3 ILPP meeting • Offered my expertise to Service Evaluation Team	
Y2K Compliance/Readiness	• attended one team meeting FYI	
• Year 2000 Budget • Finance, Payroll - HR Software Implementation • HSD Management Audit	• no go ahead	
Other projects		
Organization Chart	▪ Completed January 2000	
Locate free mapping software to map all U.S. counties	▪ Could not locate free software	
County relationship map	▪ ongoing	

EVALUATION OF PETER'S PROFESSIONAL COMPETENCE

How do you, as sponsor and client, evaluate the quality of Peter's . . .
. . . preparation of team and progress meetings
. . . facilitation of meetings
. . . follow-up of team and progress meetings
. . . fresh ideas and suggestions for County CQI

How do you evaluate Peter's communication with . . .
. . . Team members
. . . Department heads and elected officials
. . . Staff

How can Peter improve this communication?

Does Peter complete his projects and assigned projects on time or informs you of changes to the deadline? What can be improved

How do you, as sponsor and client, evaluate Peter's professional expertise?

Does Peter make good use of the information Randy provides (e.g., county government and quality literatures)?

Does Peter show an understanding of how Kalamazoo County Government operates? How can he improve?

GENERAL EVALUATION

The biweekly meetings with Peter are helpful.	I agree	I disagree	Suggestions
Peter keeps me informed about CQI in county.	I agree	I disagree	Suggestions

What was good about the internship so far?

How could Peter improve his performance?

What could be improved with respect to the support you / the county provides for Peter?

What are benefits of this internship so far that you did not expect / anticipate?

Appendix EE

Best-Worst Exercise
(Based on D. M. Brethower, class notes, January 6, 1998)

	BEST	WORST
CHANGE	Things we want to get	Things we want to avoid
NO CHANGE	Things we want to keep	Things we want to get rid off (most powerful cell in matrix)

Purpose
Group exercise for conflict resolution and for planning change (i.e., strategic planning) that results in consensus criteria

Facilitation
1. State conflict or a change situation
2. Break group into four subgroups
3. Each group generates ideas on one of the best/worst scenario of change and no change
4. Each group presents own view
5. Debrief by looking for similarities and differences between groups
6. Get consensus on what works

Outcome
Foundation of a strategic plan with four criteria for good change

Next Steps
Option 1: Participants discuss implementation
Option 2: Participants find research to support ideas and report back to team

Appendix FF

Evaluators' Ratings and Comments

SPONSOR EVALUATORS

A = Agree / **D** = Disagree / **C** = Can't answer / **X** = No answer given

Evaluation item	Sponsor evaluators' comments	S1	S2
Purpose			
1. The progressive consultative internship system (PCIS) can contribute to performance consulting for county government.		A	A
2. The purpose of the PCIS is relevant to county government.		A	A
Assumptions			
3. Interns can effectively learn and consult.		A	A
4. In my organization, it is feasible that consulting interns work consecutively on the same long-term project(s).		A	A
5. *If you have a performance improvement system in place*: The internship system fits into my current performance improvement system.		A	A
6. *If you do not have a performance improvement system:* The internship system would be helpful for developing a performance improvement system in my organization.		X	A
Goals			
7. A consulting internship would allow my organization to receive cost-effective performance consulting.	**S2**: Is there a good pool of interns?	A	A
8. It is reasonable to expect the sponsor to select projects that are challenging to the intern and that contribute to the county's or department's performance improvement effort.		A	A

Evaluation item	Sponsor evaluators' comments	S1	S2
Benefits			
9. The benefits are relevant to my organization.		A	A
10. The benefits are realistic for my organization.		A	A
11. This internship system could lead to long-term performance improvement.	**S2:** Interns must be high quality.	A	A
12. The projected benefits to my organization are worth the likely expense.		A	A
Methods, Processes, and Tools			
13. The system's processes, tools, and their application are described clearly.		A	A
14. The methods are sufficient for implementing and maintaining a progressive consultative internship system in my organization.		A	A
15. It is feasible that the benefits to my organization can be attained as a result of applying the system's processes and tools.		A	A
Planning			
16. The design clearly describes how to plan the internship system.		A	A
17. The planning tools are useful.		A	A
18. The design clearly identifies direct and indirect resources required from the sponsoring organization.		A	A
19. The design clearly describes what is expected from the sponsor.		A	A
20. The requirement for clerical staff support is reasonable.		A	A

Evaluation item	Sponsor evaluators' comments	S1	S2
21. I should be able to obtain Board approval for such an internship system.	**S1:** Probably would not need Board approval. I would implement it administratively.	A	C
Selection and Recruitment			
22. The design clearly describes how to select and recruit interns into the system.		A	A
23. The intern recruitment tools are useful.		A	A
24. The recommended pay (equivalent to graduate stipends at approximately $20/hour) is reasonable.	**S1:** I'm not sure about this.	A	C
Learning and Consulting Support			
25. The learning support tools are useful.		A	A
26. The consulting support tools are useful.		A	A
27. The time requirement for biweekly meetings with the intern is reasonable.		A	A
28. It is feasible and practical for interns to have access to senior management's decision making processes.		A	A
29. As member of senior management, I am able to provide relevant projects and for supervising the intern.		A	A
30. Part-time consulting interns can become an accepted part of my organization.		A	A
31. The design clearly addresses the issue of confidentiality.		A	A

Evaluation item	Sponsor evaluators' comments	S1	S2
Evaluation			
32. Biweekly progress meetings with intern are sufficient to support intern learning and consulting.	**S2:** Depends on the intern.	A	A
33. The continuous evaluation process and tools are useful.		A	A
34. The year-end evaluation process and tools are useful.		A	A
35. The long-term evaluation process and tools are useful.		A	A
Tools Overall			
36. I would add more tools. Please describe.		D	D
37. I would remove some tools. Please describe.		D	D

Overall Evaluation

S1: Excellent

S2: Excellent

I would like to add the following evaluation criteria (optional):

S1: *None*

S2: *None*

Overall comments (optional):

S1: I think this is a very well thought out and well planned system. I think it would require a long-term relationship between the faculty advisor and sponsor.

S2: Well thought out—good job—very helpful

FACULTY ADVISOR-EVALUATORS

A = Agree / **D** = Disagree / **C** = Can't answer / **X** = No answer given

Evaluation item	Faculty evaluators' comments	F1	F2
Purpose			
1. The progressive consultative internship system (PCIS) can contribute to performance consulting for county government.		A	A
2. The purpose of the PCIS is relevant to HPT/OBM graduate education.		A	A
Assumptions			
3. Interns can effectively learn and consult.	**F1:** to? (*circled "and"*)	A	A
4. Internships can be connected so they provide progressive learning opportunities and progressive organizational performance improvement.	**F1:** Not easily, though. It's all in the details.	A	A
5. The internship system is consistent with current practices at my university.	**F1:** Style is a good idea but few people are so organized. **F2:** I believe, however, that this is an innovative system. But I don't have enough data.	D	C
Goals			
6. A consulting internship in county government program could generate interesting and challenging assignments for my graduate students.		A	A
7. The internship system would allow me to offer relevant internship projects to my current and prospective students.	**F1:** They already have more than they can handle.	A	A
Benefits			
8. The benefits are relevant to HPT/OBM graduate education.		A	A

Evaluation item	Faculty evaluators' comments	F1	F2
9. The benefits are realistic to HPT/OBM graduate education.	**F1:** Not sure what this means (*circled "realistic" and added "?"*)	C	A
10. This internship system could develop into an ongoing internship program for both faculty and graduate students.		A	A
11. This internship system could generate internship projects for other university departments and thus support collaboration between university and the community.	**F1:** Good idea. **F2:** Actually, this will be a great accomplishment.	A	A
12. The projected benefits to students and the department are worth the likely expense.	**F1:** This should be a $ maker for the univ.-not an expense.	A	A
Methods, Processes, and Tools			
13. The system's processes, tools, and their application are described clearly.	**F1:** Clear, but considerable fleshing out is needed before implementing. **F2:** Understanding that the document I reviewed consists of design specifications.	A	A
14. The methods are sufficient for implementing and maintaining a progressive consultative internship system.	**F1:** Ideas sufficient, some details lacking. **F2:** They are a great start. But you need contingencies for sponsor, faculty . . . not clear what they are other than to be persuaded by the good nature of the endeavor.	A	D
15. It is feasible that the benefits can be attained as a result of applying the system's processes and tools.	**F1:** Again, with specifying the tools & checklists more explicitly.	A	A
Planning			
16. The design clearly describes how to plan the internship system.	**F2:** Though, the hardest part is going to be finding meaningful areas of improvement.	A	A
17. The planning tools are useful.	**F1:** Conceptually—not necessarily practically. That is, those are not the tools that would be used—they just tell you how to design them.	A	A

Evaluation item	Faculty evaluators' comments	F1	F2
18. The design clearly identifies direct and indirect resources required from the university.	**F1:** No section on this.	D	A
19. The design clearly describes what is expected from the faculty advisor.	**F2:** Though I am concerned that the supervision time is too little.	A	A
Selection and Recruitment			
20. The design clearly describes how to select and recruit interns into the system.	**F1:** Criteria are described. I wouldn't call this "How to"	D	A
21. The intern recruitment tools are useful.	**F1:** Again, conceptually—not practically yet.	A	A
22. This type of independent internship would not be suitable for undergraduate students.	**F1:** Strongly disagree. **F2:** Undergraduates could have a role assisting graduates, and yet helping undergraduates to obtain useful skills.	D	D
23. The recommended pay (equivalent to graduate stipends at approximately $20/hour) is reasonable and competes favorably with pay for consulting graduate students in the private sector.	**F1:** It could be a little higher, depending on experience and the county budget.	A	A
Learning and Consulting Support			
24. The learning support tools are useful.		A	A
25. The consulting support tools are useful.		A	A
26. The time requirement for biweekly faculty supervision is reasonable (not more than other internships).	**F2:** It might need more time.	A	A
Evaluation			
27. Biweekly progress meetings with intern are sufficient to support intern learning and consulting.	**F2:** Not sure, it depends on intern.	A	C
28. The continuous evaluation process and tools are useful.		A	A

Evaluation item	Faculty evaluators' comments	F1	F2
29. The year-end evaluation process and tools are useful.		A	A
30. The long-term evaluation process and tools are useful.		A	A
Tools Overall			
31. I would add more tools. Please describe.	**F1:** I'd add more detail—the conceptual descriptions you provide are useful, but they are not tools to be used. They describe how to develop the tools. This is a very important step that would have to be conducted at some point; by someone.	X	C
32. I would remove some tools. Please describe.	**F2:** I need to see results with current system to make a judgment call.	D	D

Overall Evaluation

F1: Adequate

F2: Excellent

I would like to add the following evaluation criteria (optional):

F1: *None*

F2: *None*

Overall comments (optional):

F1: Very well written and very interesting. It utilizes well the ABA & HPT concepts & looks great on paper. I wish we could pull off something like this but it would not be easy.

F2: I believe this is a wonderful endeavor. It has tremendous value for sponsor, student, university program and intern. This is "exactly" what university programs should be doing to develop capable graduates. Congratulations on a job well done.

INTERN-EVALUATORS

A = Agree / **D** = Disagree / **C** = Can't answer / **X** = No answer given

Evaluation item	Intern evaluators' comments	I1	I2
Purpose			
1. The progressive consultative internship system (PCIS) can contribute to performance consulting for county government.	**I1:** But there is some challenge in convincing county government of the need for, value of, and practicability of HPT. **I2:** I see value in the primary and potentially supportive roles of the intern.	A	A
2. The purpose of the PCIS is relevant to my career plans.	**I2:** Skills acquired in the PCIS would contribute to my career plans and professional development.	A	A
Assumptions			
3. Interns can effectively learn and consult.	**I1:** But would really depend on the student—there are stronger/weaker students in any graduate program and some would be more effective than others. **I2:** Within this model and with appropriate leverage in the organization, an intern could be a very effective consultant.	A	A
4. Internships can be connected so they provide progressive learning opportunities and progressive organizational performance improvement.	**I1:** I believe this is true, but wonder if some students would be satisfied with "continuing a project already in place." I wonder if you will see continuation and expansion into new areas at a fairly rapid pace.	A	A
Goals			
5. A consulting internship in county government program could generate interesting and challenging assignments.	**I1:** My only fear is that students may worry about the "pace of change" that they may face in any county organization. It has been my experience so far that while change may be necessary and desired by the county agency, it is often slow in	A	A

Evaluation item	Intern evaluators' comments	I1	I2
	coming as proposals have to work through channels, go to committee, be adopted by line staff, and written into policy manuals. The bureaucracy of county government is frustrating as I have seen things "stall" that a private or for-profit industry would have jumped on.		
6. A county government internship will add value to my interpersonal and professional repertoire.	**I2:** It could, but maybe more or less than other opportunities depending on the intern's current level of experience.	A	A
Benefits			
7. The benefits are relevant to my career plans.	**I1:** See comments to #5.	A	A
8. The benefits are feasible.	**I1:** I hope!!! (see also comments to #5)	A	A
9. This internship system could provide research opportunities for faculty and graduate students.		A	A
10. The recommended pay (equivalent to graduate stipends at approximately $20/hour) is reasonable and competes favorably with pay for consulting graduate students in the private sector.	**I1:** I'd have to know more about which K'zoo county org. the intern would be working with. **I2:** $25 is a common figure nowadays, but $20 is acceptable. (You want to compete for "TOP" students.)	D	A
Methods, Processes, and Tools			
11. The system's processes, tools, and their application are described clearly.	**I2:** I would have liked a more molecular view of the tools, but I am sure they would be sufficient given the quality of the design.	A	A
12. The methods are sufficient for implementing and maintaining a progressive consultative internship system.	**I1:** As long is there is sufficient county government "buy-in."	A	A
13. It is feasible that the benefits can be attained as a result of applying the system's processes and tools.	**I2:** *Evaluator underlined* "feasible that the benefits can be attained"; The tools are good, but I would actually like to see them.	A	A

Evaluation item	Intern evaluators' comments	I1	I2
14. The tools will help me navigate in a large organization (e.g., orientation to organization, broad projects).	**I2:** (If done correctly) (See above)	A	A
Planning			
15. The design clearly describes how to plan the internship system.		A	A
16. The planning tools are useful.		A	A
Selection and Recruitment			
17. The design clearly describes how to select and recruit interns into the system.		A	A
18. The intern recruitment tools are useful.		A	A
19. This type of independent internship would not be suitable for undergraduate students.	**I1:** Agree at WMU—undergrads probably don't have the knowledge necessary for the work--not sure about program elsewhere.	A	A
20. I would use the internship portfolio in my job search.		A	A
21. The design clearly describes what is expected from the intern.	**I2:** The sponsor and intern establishing deliverables for each project would be key!	A	A
Learning and Consulting Support			
22. The learning support tools are useful.		A	A
23. The consulting support tools are useful.		A	A
24. The learning and consulting support tools support my working independently.	**I2:** The tools do, so I agree; but the amount of decision space given by the sponsor is a key factor in this process.	A	A
Evaluation			
25. Biweekly meetings with the sponsor and faculty seem sufficient to support my learning and consulting.	**I2:** Again, making decisions that involve others is what can make additional meetings necessary, otherwise biweekly is okay.	A	A

Evaluation item	Intern evaluators' comments	I1	I2
26. The continuous evaluation process and tools are useful.		A	A
27. The year-end evaluation process and tools are useful.		A	A
28. The long-term evaluation process and tools are useful.		A	A
Tools Overall			
29. I would add more tools. Please describe.	**I2**: I would add tools that evaluate the transfer of knowledge from one intern to another on a weekly basis for the first six weeks or so.	D	A
30. I would remove some tools. Please describe.	**I2**: As part of the relationship management system (p. 27), I think a log w/ the dates & interactions with people may be overkill. Important or seemingly significant ones may be okay, though.	D	A

Overall Evaluation **I1**: Excellent

I2: Excellent

I would like to add the following evaluation criteria (optional):

I1: *None.*

I2: More eval. of how the knowledge and document transfers occur w/in the system.

Overall comments (optional):

All comments by **I2**:

1. There are two regularly scheduled meetings—one with the sponsor, and one with the advisor (plus there is reading and system maintenance). To be attractive to the intern, all this time must be paid time. Will the county want to pay the intern for all this time? Then again, . . . it might not be a big deal at all for them.

2. Who ensures the quality of the intern's recommendations before implementation, . . . the advisor? Will the advisor be able to dedicate that amount of time to the project?

3. How about a tool or guideline to balance the learning and consulting (i.e., 2 out of 20 hrs. a week spent learning . . . .)

4. (Interns as Experts) – Interns will need support on all projects (from their sponsor) to act effectively as the expert.

5. Two meetings a month may not be sufficient if the intern does not have enough decision space. (Good email communication may suffice though.)

6. A third assumption must also be made. That is that either A.) The county knows what they valuable projects to be conducted are or B.) the county will give the intern permission to conduct the valuable projects.

7. The county must be willing to accept that it will take the new intern some amount of time to get "up to speed" even with the resources provided.

8. Some overlap of interns may be required to make the PCIS work efficiently (i.e., - 1 – 3 weeks).

9. There could be trouble changing an intern in the middle of a complex project. It probably should not be done, or it should be done with great care and planning.

10. As the PCIS library grows, it needs to be kept in a logical system of organization. Furthermore, after many successive internships, the current intern cannot be expected to be familiar with the entire library, but it (the library) is a great resource tool.

11. Will there be limits (maximum or minimum) on the number of hours a week an intern can work? (To protect the student and the county gov.)

12. Determining whether or not PCIS graduates are successful after graduation (p. 35) may not be very relevant b/c most students picked for this position will already have a wide variety of experience before taking part in the PCIS; but it is nice to have anyway.

13. The internship contract should also include the advisor and commit the advisor to meeting times as well. It should be a three-way contract.

14. I have enjoyed reading your design for the PCIS. It is a great piece of work and will add a lot of value wherever it is implemented. I have checked "excellent" above b/c I feel it is much better than adequate, although I would like to see further development of the tools that make the internship "progressive" before I would consider implementation. In other words, I don't necessarily recommend changes, I only request elaboration. Thanks again.

Appendix GG

Newspaper Articles and Editorials About the County's Criminal Justice System Study and its Implementation

Date	Title of article / editorial	Author	Page(s)
01/24/00	'Cracking' the criminal justice system: New council eyes increased communication and coordination in getting offenders off the streets	Lynette Kalsnes	A3-A4
01/27/00	Can the Criminal Justice Council do what COG can't?: The new council should cooperate to solve lingering problems.	Editorial	C2
02/03/00	Study pans local justice system: 141-page report finds problems at all levels, from enforcement to courts to jail	Bob Allison	A1, A4
02/05/00	Expert: revamp courts attitude: Drop back-room politics and consider alternative punishments, consultant tells law-enforcement officials	Bob Allison	A1-A2
02/06/00	Criminal justice study leaves us with more concerns than ever: The problems are more than just outdated buildings; programs and a "local culture" that resists change must also be addressed	Editorial	F2
03/02/00	Judges criticize critical report: Draft study by California consultants contains inaccuracies, judges say.	Bob Allison	A1-A2
03/09/00	Solving criminal justice woes is top goal	Tom Haroldson	A2
04/07/00	County police, court study almost set: Final report on Kalamazoo County's criminal justice system should be ready in two weeks.	Bob Allison	A3-A4
04/20/00	Justice reports calls for 'quantum change': County system needs widespread changes, study finds	Bob Allison	A1, A4
04/20/00	Study outlines options for new, expanded county facilities; juvenile home, jail top priorities	Bob Allison	A7
04/25/00	'We have a lot to do:' Meeting reveals 2002 tax vote possible on courts-jail upgrades	Bob Allison	pp. A1-A2
04/27/00	More economical solutions to trim the price tag: A criminal justice tax increase might have a chance if it isn't a huge take-it-or-leave-it request	Editorial	C2

Date	Title of article / editorial	Author	Page(s)
05/17/00	Consultant hired to monitor criminal justice changes: Kalamazoo County board debates $66,000 cost for follow-up reports	Bob Allison	A3
08/02/00	Justice system reform comes under fire: Portage officials say county commissioners not involved enough	Bob Allison	A3, A5
08/19/00	Changes looming for criminal justice system: Committee works on combining computer network and diverting low-risk criminals from county jail	Bob Allison	A3-A4
08/31/00	Computer net to link police, courts also explored	Bob Allison	A3-A4
12/06/00	Countywide criminal justice system makeover proving costly	Bob Allison	A3-A4
01/10/01	Study lambastes local justice officials: Consultant blames bunker mentality, faulty assumptions for resistance to proposed changes	Bob Allison	A1-A2
01/17/01	Memos critical of justice report: Chief judges say consultant doesn't give them enough credit for change	Bob Allison	A3-A4
01/20/01	County justice leaders defend progress	Bob Allison	A3-A4
01/31/01	Justice critic called on carpet: Consultant accused of short-changing achievements	Bob Allison	A3-A4
02/23/01	Justice consultant refuses to back down: Local leaders have work do to, Kalmanoff tells county board	Bob Allison	A3-A4

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