

FROM THEORY TO PRACTICE: A FORMAL  
REPORT FOR AN INTERNSHIP AT  
A MAJOR GAS UTILITY  
COMPANY

By

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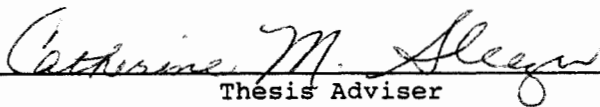
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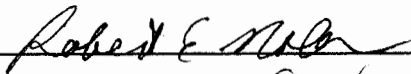
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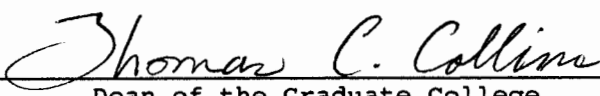
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## CHAPTER I

### INTRODUCTION

This section describes the project background, internship, and purpose of the study. It then details how this project was consistent with organization goals and improvement of cost effectiveness.

#### Background

This report was the result of an internship conducted at a utility based company in charge of the distribution and sale of natural gas over a large portion of Oklahoma. The company was the flagship of a large corporation, and employs 1,992 of the organization's 2,229 employees. The organization was implementing a new strategic plan, and seeing much change. Part of the organization's new strategic plan was to optimize all employee training and education programs. The internship project was a result of the company's desire to evaluate training and development programs to ensure they were congruent with the strategic objectives of the organization.

#### Internship

The internship was conducted by a student pursuing a M.S. degree in Occupational and Adult Education with an emphasis in Human

Resources Development. The internship was designed to last eleven weeks, two full days per week to enable the intern to put to practice the theories learned in the graduate program.

At the beginning of the semester, upper management decided that the primary project would be to evaluate the company's current educational assistance program. To complete this project the intern would need to become an expert in the area of educational assistance programs. Along with this assignment, various functions within the training department would be performed as assigned by the internship supervisor who was the manager over training and development. This report details the evaluation of educational assistance programs, overviews the other internship assignments, and provides a reflection on the internship project.

#### Purpose of Study

The purpose of this internship was to provide a relevant and useful practical study in the field of human resources development. The intern in this project recognized that previous research in the area of educational assistance plans was limited, and sought to improve the quality of research available. Using action research would provide a practical methodology for evaluating educational assistance (EA) plans. The intent of the intern was to provide an exemplary "guide to practice" concerning evaluation of educational assistance plans.

### To Evaluate Subject Matter Analysis

Another purpose of this study from a research perspective was to determine the effectiveness of a research tool known as subject matter analysis (SMA). SMA has been as a useful tool described in theory (Swanson, 1994) and in conducting model building research (Sleezer, 1991). This study extends previous research by investigating the effectiveness of SMA in guiding the collection, analysis, and synthesis of information for an in-depth study on EA plans within organizations. This study had organizational support because organizational decision makers wanted synthesized information on the EA program.

One of the company's objectives within the new strategic plan was to optimize employee training and education. The action plan to carry out this strategy was to evaluate all training and employee education programs for improvement, elimination, and additions. Basic human resource development considerations have caused many organizations to review educational assistance programs for their effectiveness and cost. Companies that are going through the process of "restructuring" are often concerned that programs developed before restructuring may not fit with the new plan.

### Consistency With Organizational Goals

The purpose of most educational assistance programs is to develop and retain the employees, and to achieve optimum development



of those employees. The purpose of the company's plan being studied was no different. The last two years had seen the retirement of the two top level executives in the organization. Their successors were two young, well educated executives with new and exciting ideas about what direction the company should move. These two new executives seemed to realize the value of strong employee education programs. As a result of this change each program the company offered was being evaluated, especially programs which deal with the educational development of employees.

#### Improvement of Cost Effectiveness

Another purpose of this study was to try and improve the cost effectiveness of the program and streamline the administrative portion of the plan. As with any organization the company was looking for ways to run programs more effectively with less cost. The goal of the organization was to make the EA plan "user friendly". To measure the benefit an EA plan brings can be difficult. Some of the benefits that result from these plans are intangibles. It is hard to measure the benefit a company receives when an individual obtains a degree, as opposed to the benefit from that individual without the degree.

The benefit is generally recognized when a superior sees improvement in that employee's job performance, as the result of going to school. Factors such as positive attitude, critical thinking skills, and company loyalty can all be attributed to an

employee continuing their education. These attributes also greatly benefit the company, but it is difficult to assign them a dollar value.

## CHAPTER II

### METHODOLOGY

This section describes the methodology that was used, action research. It also describes the tool that guided the study, Subject Matter Analysis (SMA).

#### Method of Inquiry

The intern used action research as the method of inquiry for the study. Action research was defined by John Elliot (1981) as "the study of a social situation with a view to improving the quality of the action". The aim of action research is to develop the practitioner's personal interpretive account of professional practice and theory (McKernan, 1988). Action research serves as both a method used to solve organizational problems, and a method of inquiry used to set standards of practice.

#### Research Tool

Subject Matter Analysis (SMA) is a tool for analyzing and documenting complex non-observable work behaviors (Swanson, 1994). In *Analysis for Improving Performance*, Swanson explained that SMA can be used to identify critical knowledge work behaviors, the ones that have a tendency to affect performance on the job. Knowledge work requires expertise, not just information. The most important

feature of the SMA method is the connection of information and theory to expertise and performance (Swanson,1994). In today's economy it is crucial for human resource development (HRD) professionals to be able to effectively analyze and synthesize knowledge work skillfully.

#### Analyzing Knowledge Tasks

SMA generally begins with a performance objective derived from a diagnosis of needs or tasks. In other words, an area of need is defined, and is called the subject area. After this subject area is analyzed and a Subject Matter Description is written, the resulting information should provide information that can be used to enhance work behaviors.

#### Analysis Plan

Once a task, or job has been identified, the analyst must then create a plan for analyzing knowledge tasks. This plan can be compared to a road map that guides the researcher through the analysis. The plan is a crucial part of starting the research and can be changed or altered as the need arises.

#### Behavioral and Literature Search

There are two different directions to travel with the investigation. A literature search must be conducted along with a behavioral search. It makes no difference, according to Swanson

(1994), which of these is conducted first. They can also be carried out concurrently.

The behavioral search gives the analyst first hand information about the organization. Methodology in this type of research can include: employee interviews, questionnaires, observations, and review of company records. A behavioral search can be challenging as well as fun for the researcher. One never knows what may be uncovered.

The literature search is simply researching what has already been written about the subject area. What do the experts say? What types of studies have been done? What were the results of those studies? It is also very important that most of the resources are recent, so that no findings or studies are missed. Once all data is collected from both the behavioral and literature searches the information must be analyzed. The information can then be arranged so it is more useable for the analyst. Analysis of the data allows the researcher to see what areas might be lacking information, so that more research can be done in those areas.

When analysis of the information is complete, the researcher can then begin to synthesize the data. This step involves putting the pieces of information together so that they fit as a whole. Just as a puzzle is not complete without all of the pieces, synthesis cannot be obtained without all of the analyzed data.

### Synthesis Model

A synthesis model is a structure, in word or paper format, that is used to organize and communicate a large amount of information-facts, ideas, impressions, attitudes, or opinions about a subject (Swanson, 1994). Swanson describes a variety of synthesis models in his book *Analysis For Improving Performance*, because not all models fit all situations. Examples of these models are Reflection, Two-axis matrix, Three-axis matrix, Flowchart, Events Network, Dichotomy, Argumentation, and Graphic model. A researcher may use as many of the models as necessary in synthesizing analyzed data.

### Subject Matter Description

The final step in ASM is writing the subject matter description. This is a comprehensive accumulation of the information which has already been collected, analyzed, and synthesized. The subject matter description should be clearly written and easily understood. A list of resources should also be included at the end of the description. This is the final document of the SMA, it should be a reflection of the time and effort spent on the study.

## CHAPTER III

### IMPLEMENTATION OF SMA

#### Analysis Plan

Upon deciding Subject Matter Analysis as the tool for evaluating EA programs, the intern completed the analysis plan for knowledge task (See Appendix A). The plan included the following for the behavioral search; interviewing 15 subject matter experts, asking 30 employees to complete written surveys, and reviewing all company records concerning the plan. The plan for the literature search was to include current writings concerning employee education, tuition aid plans, and published examples of other organization's plans.

After completing the behavioral and literature searches the data would be analyzed and synthesized. In synthesizing the information the argumentation and two-axis matrix synthesis models would be used. Finally, the synthesized data would be used to write the subject matter description concerning educational agreement plans.

#### Behavioral Search

For the behavioral search the intern interviewed as many subject matter experts as possible. In this case, the subject matter experts were human resources specialists from other companies

who were in charge of the educational assistance plans within their organization.

The intern conducted 15 interviews with subject matter experts. The intern met with the intern supervisor to determine the issues of the study so that relevant question could be created for the interview. The interviews had to be conducted over the phone, since the companies were in a multi-state area. The intern then created a one-page survey which covered the main issues of concern with the current program (See Appendix B).

Next, a list of contacts was obtained from the company's compensation department. The list was comprised of utility companies from the ALTO group and a group of utility based companies from Alabama, Louisiana, Texas, and Oklahoma. Each of the human resource specialist seemed to be knowledgeable and willing to share information about his or her company's EA program. They were also interested in the specifics of the company's plan, and some of the phone conversations were very enlightening. Valuable data was gained from these interviews, and analyzing the information gave the intern a concrete set of facts on which to base the recommendations.

Next, data regarding the areas of concern from an employees perspective had to be obtained. A group of relevant questions was developed and a employee survey was written. The survey sample was initially planned at 50 employees, but later cut to 30. The survey was piloted to a group of operating personnel enrolled in the company's employee development class. The results of the pilot



survey showed it to be somewhat hard to understand in some areas, and the survey was adjusted accordingly (See Appendix C).

The intern supervisor stressed the need to do the survey on an informal basis. This made it difficult to obtain a true random sample. The intern decided to survey six individuals from each of the five districts within the organization. Three from each district would be participants of the plan and three would be non-participants. The names were taken from the employee directory on a random basis. The surveys were sent through the house mail to the employees' supervisors. Some of the surveys were also conducted over the phone interview style. The survey was intended to learn the sentiment of the employees concerning the EA plan, and to get feedback concerning how it could be improved. The survey was successful in giving a broad perspective about how the employees viewed the current plan, and how the plan could be improved.

The analysis of the extant data was the most time consuming of the three information gathering techniques. The information was scattered among many filing cabinets, boxes, and desk drawers. About five years ago, the company's training department had received major cuts in their budget, since that time all employee education was handled by one individual. As a result of being understaffed, the administrative portion of the EA plan had suffered.

Review of the extant data included a study of past cost data, participation data, and institutional data. At the request of management, the intern created a comprehensive report of the data for fiscal 1994. Much of the data regarding prepayment and

reimbursements for '94 was found on computerized printouts from the Data Processing Department. However, some of these costs were not itemized according to what the cost covered. To get an accurate itemized figure for tuition and books, actual hard copies of each participant's educational agreement form had to be reviewed. This was time consuming, but proved to be the only way to get accurate figures.

The data concerning participation data had to be derived much in the same way. A list of all of the '94 participants of the plan that included field of study and institution attended was created. Again a review of the educational agreement plan for each of the 109 participants was required.

This information was used to create a summary of the degrees being pursued within the organization. A breakdown of participation of the students per institution was also compiled. Finally, each of the 22 different institutions which students had attended in '94' were called to determine their cost per credit hour of tuition. A summary sheet to report the data was then created from this body of information.

#### Literature Search

The literature search started with a search in the ERIC data base. The information on the topic was limited. The intern did, however, find some works that were both relevant and useful to the study. Resources included books, journal articles, and ERIC documents. One useful publication was a guide to evaluating

Employment Based Tuition Assistance published by the National Institute for Work and Learning. It was a comprehensive guide to help organizations evaluate their EA programs. The information found in the literature search strongly verified the data learned in the behavioral search.

Next, the intern went to the company's tax department and began to review the tax issues involving educational assistance plans within organizations. The main issue was: if the plan was opened to include personal enrichment courses, would the employee have to include this as income on his/her taxes, and could these courses be treated the same as business and degree plan related?

Upon reviewing Internal Revenue Code #127, it was discovered that personal enrichment courses could be treated the same as business-related courses, but only if they were a part of a plan which qualifies under IRC 127. This confirmed that opening the plan to include personal enrichment classes would not effect the tax status of the employee, or the organization.

#### Synthesis of the Data

Once the research was completed, the data was analyzed. All of the data had been placed on computer disk, so printouts of all of the data was readily available. This made the analysis phase of the research go very smoothly. The data was then organized and put into it's proper place. This allowed the intern to review areas where specific information might have been lacking.

The next task was to decide what models of synthesis would be used. Because of the nature of the project, and the fact that the recommendations would have to be presented to management, the argumentation model was used. This model provided a good representation of the pros and cons of a liberal EA plan, as opposed to a more conservative plan.

For the second synthesis model, a two axis matrix was used to synthesize the results of the interviews with subject matter experts. These interviews provided pertinent information to the study and creditability in this company context. The two-axis matrix provided an effective method of synthesizing and presenting this informatio. Both synthesis models are contined in Appendix D.

#### Subject Matter Description

The final stage of SMA was to write the subject matter description. This description included any piece of information relevant to analyzing educational assistance plans. The final product was a comprehensive description of factors to consider in analysis of educational assistance programs. The purpose of the subject matter description was to make someone an expert on the subject. Appendix E contains the Subject Matter description.

## CHAPTER IV

### RECOMMENDATIONS TO THE HOST COMPANY

Based on the SMA, recommendations were made to the host in the following areas: cost coverage, cost limits, reimbursement and pre-payment, payback plan, employee eligibility, provider eligibility, coursework/degree plan eligibility, and marketing and networking of the plan. The following sections provide the recommendations and rationales.

#### Cost Coverage

##### Recommendation

That current policy, regarding the specific cost covered under the plan, remain unchanged.

##### Rationale

Research in the area of cost coverage by educational assistance plans, confirmed that the company's plan was very competitive. Especially in light of the fact that the company had recently decided to cover 100% of books. This decision had a very positive affect on plan participation rates. Approximately 6 of the 15 companies interviewed, paid for 100% of books, tuition, reasonable associated fees, proficiency examinations, and graduate entrance

exams. Parking, late enrollment or health fees were not among the costs covered among any of these companies.

#### Cost Limits

#### Recommendation

That the current policy of having no per credit hour, per semester, or annual cost limits remain unchanged, however, this area should be carefully monitored.

#### Rationale

Research revealed that the cost of private institutions, such as Tulsa University, were approximately four times higher than state institutions. It could be argued however, that the quality of education received at a private institution is four times better than one received at a state school. In fiscal 1994, the company had a total of 12 students attending private institutions. These institutions might have provided programs where the employee might not otherwise continued their education if that specific program were not available.

The recommendation to carefully monitor participation rates within private institutions was based on the analyst's assumption that a new and improved plan would stimulate an increase in participation, thus increasing company costs.

Another issue, was that of limits on the amount of hours a student may take in a semester. Sometimes over ambitious students might overload themselves, which could have an impact on job

performance. Research of the extant data did not show this as a problem, but an increase in participation could have stimulated new areas of concern. Should this become a problem, then a credit hour maximum per semester could provide a solution.

#### Reimbursement and Prepayment

##### Recommendation

That current policy within the plan, regarding reimbursement and prepayment remain unchanged.

##### Rationale

Of the companies surveyed none of the 15 offered it's employees a prepayment option. Although this option calls for more administrative work, Prepayment saves the employee from being "out of pocket" any money. Thus, prepayment eliminates another barrier to participation.

#### Payback Plan

##### Recommendation

That current policy regarding the payback portion of the educational agreement plan be changed so the employee is relieved of the debt upon completion of the class, with a satisfactory grade and also name of the plan be changed to from the Educational Agreement Plan, to the Employee Education Plan.

### Rationale

The payback portion of plan is the area which varied a great deal from any other encountered in the study. Under the current plan an employee must stay employed with the company for three years after completion of school, before they are totally relieved of the debt. Until the end of this three year period, money granted to employees for books and tuition is considered a loan.

Of the 15 companies surveyed, none had any type of payback plan. Once the employee had finished the course with a satisfactory grade, they were relieved of any debt to the company. When these companies were asked why they had no payback plan, they mostly replied that only a small percentage of employees who left the company for another job after completing their degree plan. Secondly, they stated that if an employee wanted to leave the company they had no desire to keep them there against their will.

In a mobile society an employer is just as likely to benefit by hiring someone trained elsewhere as to suffer from the loss of someone trained in-house. How many people do not leave because they recognize their employer is making an effort to help their careers and treat them fairly? Mobility is a fact of American life. Yet, companies with generous educational assistance plans tend to have loyal employees (Gold, 1985).

This is an area where the current plan can be greatly improved. Elimination of the three year payback plan, would relieve the company of a substantial amount of administrative work. Elimination



of the three year payback would also have a positive impact on employee participation rates.

### Employee Eligibility

#### Recommendation

That current policy regarding employee eligibility remain the same with the exception of one aspect, and that is: any employee who loses his/her job as the result of a layoff, be able to keep their eligibility in the educational assistance plan for a specified period of time.

#### Rationale

The current policy covering eligibility for participation stated that "employee must be a probationary or regular employee of the company and its subsidiaries". In today's competitive market, even in the most stable of companies, layoffs are a growing possibility.

Research revealed that a growing number of companies are facing the reality of layoffs, and adjusting their educational assistance plan so that outplaced workers are still eligible to participate in the educational assistance plan for a specified amount of time. For some individuals, this could mean the difference in finding another job or not.

### Provider Eligibility-Normal Programs

#### Recommendation

That current policy regarding provider eligibility of normal programs, remain unchanged.

#### Rationale

The current policy of the plan regarding, the institutions eligible for a student to attend, proved to be more generous than most of the companies surveyed. The current program allows for most any accredited institution which offers coursework that is business related or follows a specific degree plan.

### Provider Eligibility-Accelerated Programs

#### Recommendation

That accelerated programs be reviewed individually for approval, on the basis of geographic location of the employee and on the quality and type of curriculum offered by the program.

#### Rationale

Research in this area, revealed some accelerated programs to be very good programs, with curriculum very comparable to normal programs. However, there are some accelerated programs that use life experience as a basis for their curriculum. These programs are extremely high in cost, and the quality of education being received by the student is at best marginal.

Accelerated programs can be valuable for students in areas where institutions of higher education are limited. These programs do have some advantages over traditional institutions, such as smaller class size and better student teacher interaction. However, in areas where a variety of colleges and universities geared for the adult and continuing students are available, students should pursue the more traditional style of education.

#### Coursework/Degree plan Eligibility

##### Recommendation

That current policy regarding the type of coursework or degree plan approved, be changed to include any subject desired by the employee.

##### Rationale

There was much written concerning the differences between work related courses and personal enrichment courses. One person's hobby may be another person's job. An important question to ask might be: where do the goals of the organization and the goals of employees converge or separate (Gold, 1985).

A company which takes a broader view, feels that if a course contributes to the health, satisfaction, or thinking skills of the employee, the organization also benefits. These attributes are seen as being linked to a productive worker.

A company which takes a narrower view, is less concerned with satisfaction levels and more concerned with how the specific course can be linked to a more productive worker.

This issue also brings up tax concerns. Research in this area revealed that as long as the educational assistance plan met the requirements of the Internal Revenue Code Section 127 (and our plan does), the employee does not have to show the aid as income and therefore, does not have to claim it on his/her taxes. The code does not require the courses be business related.

The benefits of opening up our plan to any type of coursework far outweigh a more conservative type of plan. This change would stimulate a substantial increase in employee participation in the plan, increase employee satisfaction, and increase company loyalty.

#### Marketing and Networking of the Plan

##### Recommendation

That the company take a more aggressive approach to marketing and networking the program.

##### Rationale

The interviews with human resource professionals from other organizations, showed an apparent relationship between companies who strongly promote their EA plan, and higher employee participation percentages. Also, of the 30 employees surveyed, 5 of the 15 non-participants said they did not know enough about the plan. This

confirmed that the company could boost employee participation by more aggressively promoting the plan.

More promotion of the plan would keep the employees more informed about specific information concerning the plan, and would also show management's commitment to employee education. It could also be used to recognize employees who have achieved degrees on the plan. More messages or announcements in company publications could be very effective and would have a very positive effect on participation. Some of the companies surveyed even had job fairs in break areas, such as lunch rooms and coffee shops, on an annual basis. These ideas would be of little cost to the company, and go a long way toward promotion of the EA plan.

Networking was also an area of the plan in need of improvement. There must be an individual who is in charge of identifying company needs, both present and future, and relating those needs to the employees. This would allow employees to direct their coursework in the right direction.

Forecasting future needs allows employees to see what direction the company is headed, so they can hone their skills accordingly. This in turn, benefits the careers of the employees and ultimately the development of the organization.

## CHAPTER V

### FINDINGS

#### Organization

The research proved the company's current plan to be competitive with the other plans researched. However, in an ever changing business world, it is important now more than ever that a company's educational assistance plan compliment the corporate culture. With some modifications, the company's plan could offer the company an even greater return on it's investment than was already being realized.

The results of this study provided the organization with a comprehensive analysis of educational assistance programs on which to base decisions concerning what changes are made to the plan. The final results of the study provided some information that reconfirmed what management already knew and it also provided them with some new and valuable information.

The recommendations were based on information confirmed by the data. Any educational assistance plan offered by a company to it's employees is a good one, some are just better than others. Arguments could be made to justify reasoning behind the guidelines of any plan, depending on what "school of thought" one chooses.

At the end of the project, the intern had a much different opinion about what an educational assistance plan should be. The

results of the study stimulated a new way of thinking concerning how the intern viewed EA plans.

One example, was the area of the payback plan. At the beginning of the study, it was the intern's assumption that all plans had some type of clause which made the employee stay for a specific amount of time after completing a degree, before the debt was relieved. This assumption was based on the premise that when an organization pays for an employees education, they would want that individual to stay employed with the company, and if the employee chose to leave, they would be obligated to pay back the money for your education. By the end of the study, the data confirmed another viewpoint to this issue. The organizations that were surveyed had a different way of viewing EP payback.

#### HRD Field

The results of this action research study provided the HRD field with a comprehensive study on evaluating educational assistance programs within organizations and a study that validates subject matter analysis as an effective and well organized research tool. The study resulted in a valid resource for someone who might have the same task as the intern in this project.

The research also revealed a lack of quality and current works in the area of EA plans. In today's business world, a larger number of organizations are evaluating all programs to ensure cost

effectiveness. The results of this internship, provide a guide for anyone who may have the task of evaluating a company's educational agreement program.



## CHAPTER VI

### OTHER ASSIGNMENTS

In addition to the primary task of assessing the company's EA program, the intern was given various assignments and small projects within the training department, some of which amounted to nothing more than administrative tasks within the human resources function.

The intern had the privilege of sitting in on two different training courses. The first, was a supervisory skills workshop. The instructor of the class was the training coordinator for the company. She allowed the intern to be involved in some of the role play within the class. This proved to be valuable experience for the intern because it provided an opportunity to evaluate a facilitator in a real life situation.

The intern also observed a employee development skills class. This class seemed to validate the company's commitment to developing the employees. Another task assigned during the internship was entering training reports and educational agreement data into the computer system.

The intern was also given the assignment of designing the presentation of findings and recommendations on the EA project to management. This presentation was to be given by the manager of Training and Development. The record of all internship activities were kept using an internship log (See Appendix F).

## CHAPTER VII

### REFLECTION

The final outcomes of this project proved very valuable to the student and to the organization. The intern was able to mesh the theories learned in the HRD graduate program to actual practice. While doing the project the intern provided a valuable study to the organization. The intern was also able to get a better grasp of the training department as well as the overall human resource department functions. Each assignment no matter what the magnitude, increased the intern's knowledge base concerning the field of human resources development.

At the beginning of this study the intern was somewhat apprehensive of the nature of this study. There was a feeling that the project may have been granted just to satisfy the internship requirement. The intern's advisor had expressed the need for this to be an area worthy of analysis, from which the organization could benefit. In the initial meeting with company management, the intern conveyed that it was important for this study to have some relevance, or it would be a waste of both the organization's and the intern's time.

Soon after starting the analysis the intern realized this was an area very worthy of investigation. The project actually turned out to be much bigger than previously realized. The organization defined it's position as being in a constant state of becoming, and

that each aspect of the organization was being carefully reviewed and evaluated. This project was just a piece of the puzzle.

Another important outcome of this internship was the intern's realization that first impressions are not always correct, and that all business decisions require careful consideration of all aspects of the issue. The research in this project provided the intern with strong evidence on which to base recommendations to the company. The project also stimulated the intern's realization that most everything learned in the HRD graduate program has practical application. During the project the intern used information learned in adult education, curriculum, and statistical research classes. This project provided the intern with a better understanding of the concepts learned that can only be achieved through application of the principles. Only through practical application was the intern able to understand the "why" of the "who, what, why" scenario.

#### Review of Methodology

The intern used subject matter analysis to become an expert in educational assistance plans. SMA provided an organized and effective way to research a specific area of interest.

The behavior and literature searches gave the analyst a very well rounded set of data. The models of synthesis were an effective tool in synthesizing the data in ways in which it could be easily understood and interpreted. SMA breaks down the process so the researcher can systematically complete the steps of the research.

Once one phase of the process is finished, the next phase can begin. SMA brings organization to the process so the real emphasis can be placed on becoming an expert in the subject matter, and not on how to conduct the research.

SMA also gives the analyst flexibility in how much emphasis is placed in specific areas. The analyst has 8 synthesis models to pick from, and may choose the models which best suit the body of data.

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**APPENDIXES**

APPENDIX A

ANALYSIS PLAN FOR KNOWLEDGE TASK

## ANALYSIS PLAN FOR KNOWLEDGE TASK

### Step 1. Task or Performance Requirement

- \* Evaluate and recommend improvements  
for educational agreement program

### Step 2a. Behavioral Search Methods and Sources

- \* Questionnaire to 30  
participants and non-  
participants of the plan.
- \* Interview 15 subject matter  
experts from other  
companies.
- \* Research extant data of  
current program.

### Step 2b. Analysis Methods

- \* Analyze the who, what,  
when, where, how, and why  
of educational agreement  
programs.

### Step 3a. Literature Search Methods and Sources

- \* Review research on employee  
education and educational  
agreement programs.
- \* Read current literature on  
educational assistance programs  
\* Read current literature about  
other successful programs.

### Step 3b. Analysis Methods

- \* Write important ideas from the  
literature in my own words.
- \* Include Prerequisites, methods,  
and outcomes of successful  
programs.

### Step 4. Synthesis Model(s)

- \* Select and use one or more of  
the methods for synthesizing  
the information.

### Step 5. Subject matter Description

- \* Write a comprehensive, detailed  
outline or narrative on  
successful educational  
agreement programs based on the  
analysis and steps.



APPENDIX B

ARGUMENTATION SYNTHESIS MODEL

## ARGUMENTATION

Subject: Company sponsored Educational Assistance Plans

Analyst: Noel Mock

*Major hypothesis:* A narrow focused educational assistance program increases worker productivity and job effectiveness, while giving employees the opportunity to further their education in specific areas associated with current or future job duties.

*Supporting facts and assumptions:* A large percentage of companies who have educational assistance programs take on a conservative view when designing the guidelines for their programs. They are less concerned with satisfaction levels, or generic abilities and are more concerned with specific skills and abilities. Approved courses in this type of program must be related to the employees current or future job duties, or must be a part of an approved degree program. These types of programs are generally more conservative as to what types and percentages of cost are covered. Narrow focused educational assistance plans sometimes also include a payback plan. A payback plan is set up to keep employees from switching employers after successfully completing a degree plan. Participants in these plans are generally expected to maintain a certain grade, or the cost of the course is not refunded.

*Counterhypothesis:* A Liberal educational assistance plan creates a productive, as well as well rounded work force for the organization, while contributing to the employees satisfaction, health, thinking skills, and company loyalty.

*Supporting facts and assumptions:* Companies who support this viewpoint are generally big advocates of continuing education. Their strategy is to eliminate as many barriers to participation in continuing education as possible. They feel that a more educated work force, no matter what curriculum, will be a happier and more productive workforce. Their belief is that all learning enhances skills by strengthening individual insight and interest in life. This type of program is generally very liberal about what costs are covered by the plan. Reimbursement or advancement of fees is generally optional and completion of the course with an acceptable grade is required.

*Resolution:* The real issue in deciding what type of educational assistance plan to have is one of corporate culture. The plan must mesh well with the strategic plan and goals of the organization. Top management must decide what type of environment they wish to have in their company. Obviously, any organization that has an educational assistance plan wants to retain and develop their employees. The costs of a well designed program are minor in comparison to the potential benefits the plan could bring to the organization.

APPENDIX C

TWO-AXIS MATRIX

CHARACTERISTICS OF EA PLAN

COMPANY	% TUITION	% BOOKS	% FEES	PAYBAC	PRE/PAY REIMBURSE	BUS. RELATED	OPEN
A	100	100	100	0	0	X	0
B	95	95	95	0	0	X	0
C	100	100	100	0	0	X	X
D	100	100	100	0	0	X	X
E	100	0	0	0	0	X	0
F	90	90	90	0	0	X	0
G	100	100	100	0	0	X	0
H	100	100	100	0	0	X	0
I	100	100	100	0	0	X	0
J	100	100	100	0	0	X	0
K	75	75	75	0	0	X	0
L	100	100	100	0	0	X	0
M	100	50	100	0	0	X	0
N	80	80	80	0	0	X	0
O	75	75	75	0	0	X	0

APPENDIX D

SUBJECT MATTER DESCRIPTION

Job or Program <u>Educational Assistance Assessment</u>	Page <u>1</u> of <u>9</u>
Location <u>Oklahoma Natural Gas Company</u>	Effective Date <u>2/28/95</u>
Department <u>Company Wide</u>	Cancel Sheet Dated <u>N/A</u>
Analyst <u>Noel Mock</u>	Approved By <u>Derald Clow</u>

**Task:** Assessing Educational Assistance Plans

**Performance Standard:** To ensure that our current Educational Assistance Plan is consistent with the new Strategic Plan and Mission of the company.

I. Employee Education is defined in several ways.

- A. It focuses on identifying, assuring, and helping develop, through planned learning, the key competencies that qualify individuals for career advancement.
- B. *Nadler* defined it as "learning focused on a future job."
- C. *Lawrie* defined it as "learning directed toward a change in knowledge."
- D. Employee Education is often, but not always, linked to formal education programs sponsored by colleges, secondary schools, vocational schools, professional associations, or industry groups.
- E. It is rarely tied to the unique requirements of one organization or one occupation.
- F. Employee education takes three different but related forms:
  1. Remedial- directed toward improving the basic skills essential for finding and keeping a job.
  2. Qualifying- education for jobs which require extensive pre-entry education. ie. Accountants
  3. Continuing- efforts made by individuals to stay abreast of changes in their occupations.

II. Educational assistance program defined

1. Educational assistance programs are funds provided by employers for individuals to pursue educational programs, which may or may not be job related, generally on the employees own time.

A. Employee Educational assistance is a fairly common employee benefit in large companies.

1. In the U.S. among companies with 10,000 people or more 95% have educational assistance plans and out of the companies with 1000-10,000 employees, 85% have EA programs. (Gold, 1985)
2. In large suburban-urban areas about 50% of all employers have educational assistance plans. (Gold, 1985)

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**B. Employer perspective**

- a. Employers like these plans because they help develop and retain employees.
- b. Employers recognize that the cost of a well designed program is small, compared to the potential benefits the plan can bring in productivity, company loyalty, thinking skills, and overall attitude.
- c. EA plans can be a critical part of a companies overall human resource development strategy to identify capable individuals, update knowledge and skills, attract motivated workers to the company, and prepare individuals for future assignments.

**1. Employee Perspective**

- a. Employees like these plans because they provide a free education.
- b. EA plans give the employee an opportunity to better themselves, both at home and in the workplace.
- c. The plan can give individuals the opportunity to gain new skill for alternate career or personal goals.
- d. EA plans make the employee more valuable to the company.

**III. Factors to consider in plan design.**

**A. Plan policy- guidelines of the plan**

1. Must be well designed and clearly written.
2. Must be easy to understand.
3. Must be made available to all eligible employees.
4. Must be reviewed and updated on a regular basis.

**B. Plan purpose- defines where the goals of the employer and the employee converge or separate.**

1. Conservative plan- limits employees to a narrow definition of work related courses only.
  - a. Companies with this type of plan are primarily interested in how the course or program directly affects that employees current job productivity.
  - b. This type of plan will not approve coursework unless it is directed associated with the employees current job duties.

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2. Liberal plan- encourages participation and career growth through a broad definition.
    - a. Organizations with this type of plan are generally managed by strong advocates of continuing education.
    - b. They feel that an educated employee is a more productive, more satisfied, and even healthier employee.
    - c. They feel that the extra cost is minor compared to the payback from this type of program.
  3. Moderate plan- a plan which may have characteristics of both a liberal and a conservative plan.
    - a. Most plans fall into this category.
    - b. When designing a plan, most companies take and modify what other companies are doing to fit their own needs and goals.
- A. Employee eligibility
1. A well designed EA plan should always specify what employees are eligible to participate in the plan.
    - a. Full or part time employees.
    - b. Some organizations allow employees who have retired or have been laid off to continue on the plan for a specified amount of time as part of an outplacement program.
- B. Provider eligibility- Are employees restricted to accredited institutions, or can they take courses from any agency, private or public.
1. Private institutions- Pros
    - a. Quality coursework and curriculum.
    - b. Instructors are most generally PHD level.
    - c. Smaller class size for better student/teacher and student/student interaction.
    - d. More stringent evaluation procedures.
    - e. Have a positive effect on participation in the plan.
  2. Private institutions-Cons
    - a. Tuition costs are three and four times as high as state institutions.
    - b. Usually not geared for the adult and continuing student.



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3.
    - a. Accelerated programs-Pros
    - b. Promotes use of the EA plan by eliminating barriers to participation such as:
      - (1) unavailability of schools or colleges in a particular area.
      - (2) scheduling problems
    - c. Smaller class size allowing more student/teacher and student/student interaction.
    - d. Provides a opportunity to some individuals who might otherwise not continue their education.
  4. Accelerated programs- Cons
    - a. They are high cost.
    - b. Instructor standards are not as high.
    - c. Students don't realize the experience of a true college education.
- C. Reimbursement versus prepayment
1. Choices must be made as to when the employee should receive payment for the coursework.
    - a. Reimbursement- The employee is reimbursed when the course(s) are completed, for the costs covered by their specific plan.
      - (1) In most EA plans reimbursement is contingent upon a satisfactory grade being achieved.
      - (2) A general rule is that companies will not reimburse for a grade any lower than a C.
      - (3) In some companies a slide system is used, where 100% is reimbursed for an A, 85% for a B, 70% for a C, and 50% for a D. (note.. grades & % payback will vary)
    - b. Prepayment- Some EA plans allow for prepayment of school costs.
      - (1) This type of plan saves the employee from being out the initial cost of the coursework.
  2. Payback plan- What are the stipulations of the agreement if an employee wants to leave the company?

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- a. Promissory note- Some EA plans set the cost of school up on a note which cancels out in a specified amount of time which the employee stays at the company.
    - (1) Example- a student must stay with the company for three years after finishing school before he or she is relieved of the debt.
  - b. Under most EA plans the only time payback is required is:
    - (1) When an employee fails to complete a course in which he or she has enrolled.
    - (2) When an employee fails to make a satisfactory grade.
1. Cost limits
    - a. There are some organizations which set up cost limits for their EA plans, which are generally based on one of the following methods:
      - (1) A limit on tuition cost per/credit hour.
      - (2) A limit on per/semester costs.
      - (3) A limit on annual school cost per/person.
    - b. These limits are generally designed for one of two reasons:
      - (1) The company has a limited employee education budget.
      - (2) So the employee doesn't take on too heavy workload.
  2. Expense considerations- What cost should be covered by the plan?
    - a. Under a conservative plan, tuition may be the only cost covered, and in many cases only a percentage of it may be covered.
      - (1) More narrow plans have an adverse impact on participation rates.
    - b. Under a more liberal plan 100 % of all fees incurred may be covered.
    - c. Some plans may cover only a percentage of all costs incurred.

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- d. Expense considerations are usually based on:
- (1) How much the company can afford.
  - (2) How much importance is placed on the program.
3. Marketing of the plan- How available will information about the plan be to the employees?
- a. Employee handbook
    - (1) Educational assistance programs guidelines are most generally always covered in the company's employee handbook.
  - b. Company publications or news letters.
    - (1) Often new or general information about EA programs can be found in company publications or newsletters.
  - c. Career development counselors or centers.
  - d. Some organizations have career development centers, where counselors provide career counseling to the employees.
    - (1) Either in-house or external, these counselors are also often also in charge of career forecasting and planning.
    - (2) Career forecasting involves researching and learning information related to areas where there may be future job needs.
      - (a) The counselor then relays the information back to the employees.
      - (b) Forecasting insures the appropriate relationship between employee goals and Future company needs.
4. Tax issues
- a. Employers payment of educational expenses of employees, per Book H paragraph 2050 of the Internal Revenue Code.
    - (1) An employee must include in income the value of educational benefits provided by an employer unless the cost of such a benefit qualifies as a working condition fringe or is paid for under an accountable plan, or the benefits are provided under an educational assistance program of the employer.

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b. Type of plan, per section 127 of Internal Revenue Code.

- (1) The employer provided educational assistance is for the exclusive benefit of the employee.
- (2) Gross income of an employee does not include amounts paid or expenses incurred by the employer for educational assistance to the employee.
  - (a) "An educational assistance program is a separate written plan of an employer for the exclusive benefit of his employees to provide such employees with educational assistance".(IRC Sec. 127)

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Carolyn Vice, HR Specialist, Enogex, Oklahoma City, Oklahoma.

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Resource list

*Print Materials*

Comp, Catherine M. (1992). *Four By Four: Small Firms Think Big. Training and Development.* 46(9), 17-26.

Gold, Gerald G. (1985). *Employment-Based Tuition Assistance: Decisions and Checklists for Employers, Educators, and Unions.* National Institute for Work and Learning, Washington D.C.

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Internal Revenue Codes, U.S. Treasury Regulations.

*Interviews*

Joe Bogard, HR specialist, General Motors Corp. Oklahoma city, Oklahoma.

Bob Brewer, Training Consultant, Arkla Gas Company, Little Rock, Arkansas.

Karen Burks, Employee Development, Alabama Gas Corporation, Birmingham, Alabama.

Stephanie Cipolla, HR Specialist, Mapco, Tulsa Oklahoma.

Robert Davis, Manager of Technical Training, Lone Star Gas Company, Dallas Texas.

Mark Hayes, Training and Development Manager, Entex, Houston Texas.

Jim Hix, HR Specialist, Williams Natural Gas Pipeline, Tulsa Oklahoma.

Wendy Howell, Traing Manager, Transok, Tulsa Oklahoma.

Susie Janowski, HR Specialist, Warren Petroleum Co., Tulsa Oklahoma.

APPENDIX E

EMPLOYEE SURVEY

Instructions

This survey is being conducted to evaluate how our Educational Agreement Program can be improved and/or changed to increase participation by employees and better serve organizational needs. Thank you for your time in completing this questionnaire. This survey is strictly confidential.

(circle the response or responses that best describe your answer)

General Information

1. In what area of the company do you work?
  - a. Customer Services
  - b. Accounting
  - c. Operations
  - d. Human resources
  - e. Marketing
2. What is your current job grade?
  - a. 11-14
  - b. 15-17
  - c. 30-33
  - d. above 33
3. How long have you been employed with the company?
  - a. 1-5 years
  - b. 6-10 years
  - c. 11-20 years
  - d. over 20 years
4. Are you aware that ONEOK has an Educational agreement plan? yes / no
5. Do you currently, or have you ever participated in this plan? yes / no

Questions #6 and #7 are for individuals who have never participated in the plan. If you have ever participated in the plan, please skip to the next page.

6. I don't participate in the plan because.....
  - a. courses I would like to take are unavailable in this area.
  - b. I don't have the time.
  - c. I cannot afford 1/2 the cost of books, and other costs associated with going to school.
  - d. I don't feel it will help me advance in the company.
  - e. I have no desire to continue my education.
  - f. The company will not pay for the type of program I wish to enter.
  - g. I don't know enough information about the program.
  - h. I need more educational and career counseling.
  - i. other \_\_\_\_\_

7. Do you have any suggestions as to how the company can increase participation in this program? \_\_\_\_\_

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.....continued for current or past Educational Agreement Plan participants

8. Do you feel our current program is a good one? yes / no, if no explain\_\_\_\_\_

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9. Do you feel educational and career counseling is adequate? yes / no

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---

10. Are program participants recognized for their achievements? yes / no  
please explain. \_\_\_\_\_

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11. Is information about the program adequately available to all employees?  
yes / no , if no do you have any suggestions? \_\_\_\_\_

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12. Do you have any suggestions as to how this plan could better suit your  
educational needs? \_\_\_\_\_

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APPENDIX F

TELEPHONE INTERVIEW

COMPANY NAME \_\_\_\_\_

TYPE OF COMPANY \_\_\_\_\_

PHONE NUMBER \_\_\_\_\_

ADDRESS \_\_\_\_\_

1. Does your company currently have an educational agreement program?  
\_\_\_\_\_

2. What costs does the plan cover? \_\_\_\_\_  
\_\_\_\_\_

3. What is the payback plan? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. What types of degree programs are covered under your plan (business related or open, standard or accelerated)? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Are there any tuition costs limits under your company's plan? \_\_\_\_\_  
\_\_\_\_\_

6. What percentage of employees participate in the program? \_\_\_\_\_  
\_\_\_\_\_

7. Does your company provide career development programs for the employees? \_\_\_\_\_  
\_\_\_\_\_

8. What type of recognition is given to employees who participate and complete degrees using the plan? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Upon finishing a degree and exiting the program, are employees given the opportunity to evaluate the program? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. How does your company market the program to the employees? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

APPENDIX G

INTERNSHIP LOG

<u>DATE</u>	<u>ACTIVITIES</u>	<u>HOURS</u>
<u>WEEK #1</u>		
1-19-95	* INTRODUCTION PURPOSES, OBJECTIVES, EXPECTATIONS OF THE INTERNSHIP. * TOUR OF HR DEPARTMENT	3:00AM TO 5:00PM
1-20-95	* SET UP OFFICE * REVIEWED PLAN COST PRINTOUTS * BEGAN RESEARCH OF EDUCATIONAL * ADDED UP TOTAL COST OF BOOKS FOR FISCAL '94	8:00 TO 5:00
<u>WEEK #2</u>		
1-26-95	* STARTED COMPILING COST DATA * PARTICPATION DATA * CREATED SUMMARY OF DEGREES BEING PURSUED IN FISCAL '94 * NON-DEGREE COURSEWORK BEING TAKEN '94	8:00 TO 5:00
1-27-95	* SAT IN ON ADVANCED SUPERVISORY SKILLS WORKSHOP, WITH TRAINING COORDINATOR	8:00 TO 5:00
<u>WEEK #3</u>		
2-2-95	* MET WITH INTERN SUPERVISOR * RESEARCHED COST PER CREDIT HOUR OF COLLEGE-CONDUCTED TELEPHONE INTERVIEWS * CREATED SUMMARY	8:00 TO 5:00
2-3-95	* REASEARCHED AVG. COST OF 1 YEAR OF COLLEGE * CREATED EMPLOYEE SURVEY (PILOT)	8:00 TO 5:00
<u>WEEK #4</u>		
2/9/95	* WORKED ON ANALYSIS PLAN * DISTRIBUTED PILOT SURVEY * REVIEWED LIST OF UTILITY CONTACTS FROM THE ALTO GROUP	8:00 TO 5:00

<u>DATE</u>	<u>ACTIVITIES</u>	<u>HOURS</u>
2/10/95	* STARTED PHONE INTERVIEWS	8:00 TO 5:00
	* SAT IN W/ INTERN SUPERVISOR ON ENTERING EDUCATIONAL AGREEMENT CONTRACTS INTO THE COMPUTER SYSTEM	
	* ENTERED 20 CONTRACTS IN THE HRS SYSTEM	8:00 TO 5:00
<u>WEEK #5</u>		
2/16/95	* REVISED EMPLOYEE SURVEY	8:00 TO 5:00
	* FINISHED PHONE INTERVIEWS	
	* STARTED COMPILING INFORMATION	
2/17/95	* CREATED SYNTHESIS MODEL FOR THE SMD-ARGUMENTATION	
	* CREATED SYNTHESIS MODEL FOR INTERVIEW DATA- TWO AXIS MATRIX	8:00 TO 5:00
<u>WEEK # 6</u>		
2/23/95	* COMPILED SURVEY DATA	8:00 TO 5:00
	* STARTED WRITING THE SMD	
2/24/95	* CONTINUED WRITING SMD	8:00 TO 5:00
<u>WEEK #7</u>		
3/2/95	* STARTED WRITING RECOMMENDATIONS TO MANAGEMENT & FINAL REPORT	8:00 TO 5:00
3/3/95	* CONTINUED WRITING RECOMMENDATIONS	8:00 TO 5:00
<u>WEEK #8</u>		
3/9/95	* FINISHED RECOMMENDATIONS TO MGMT.	8:00 TO 5:00
	* REVIEWED WITH SUPERVISOR	
3/10/95	* STARTED REVISIONS TO RECOMMENDATIONS	8:00 TO 5:00

<u>DATE</u>	<u>ACTIVITIES</u>	<u>HOURS</u>
<u>WEEK #9</u>		
3/16/95	* COMPLETED REVISIONS TO * RECCOMENDATIONS STARTED ON DESIGNING THE PRESENTATION TO SENIOR MANAGEMENT	8:00 TO 5:00
3/17/95	* CONTINUED WITH DESIGN OF PRESENTATION	8:00 TO 5:00
<u>WEEK #10</u>		
3/23/95	* COMPLETED PRESENTATION * TURNED IN TO SUPERVISOR FOR REVIEW * MEETING WITH ADVISOR	
3/24/95	* FINISHED REVISIONS FOR PRESENTATION	8:00 TO 5:00
<u>WEEK #11</u>		
3/30/95	* STARTED WRITING ACTUAL POLICY FOR EEP	8:00 TO 5:00
3/31/95	* CONTINUED WRITING POLICY * SUBMIT FOR REVIEW	8:00 TO 5:00

APPENDIX H

IRB APPROVAL FORM



OKLAHOMA STATE UNIVERSITY  
INSTITUTIONAL REVIEW BOARD  
HUMAN SUBJECTS REVIEW

Date: 04-04-95

IRB#: ED-95-062

**Proposal Title:** FROM THEORY TO PRACTICE: A FORMAL REPORT FOR AN  
INTERNSHIP AT A MAJOR GAS UTILITY COMPANY

**Principal Investigator(s):** Catherine Sleezer, Noel Mock

**Reviewed and Processed as:** Exempt

**Approval Status Recommended by Reviewer(s):** None


APPROVAL STATUS SUBJECT TO REVIEW BY FULL INSTITUTIONAL REVIEW BOARD AT  
NEXT MEETING.  
APPROVAL STATUS PERIOD VALID FOR ONE CALENDAR YEAR AFTER WHICH A  
CONTINUATION OR RENEWAL REQUEST IS REQUIRED TO BE SUBMITTED FOR BOARD  
APPROVAL.  
ANY MODIFICATIONS TO APPROVED PROJECT MUST ALSO BE SUBMITTED FOR  
APPROVAL.

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**Comments, Modifications/Conditions for Approval or Reasons for Deferral or Disapproval  
are as follows:**

IF THE APPLICATION HAD BEEN SUBMITTED IN A TIMELY MANNER, IT  
WOULD HAVE BEEN APPROVED AS EXEMPT.

Signature:

  
Chair of Institutional Review Board

Date: April 10, 1995

VITA

Noel Mock

Candidate for the Degree of

Master of Science

Thesis: FROM THEORY TO PRACTICE: A FORMAL REPORT FOR AN INTERNSHIP  
AT A MAJOR GAS UTILITY COMPANY

Major Field: Occupational and Adult Education

Biographical:

Personal Data: Born in Tulsa, Oklahoma on October 5, 1967, the  
son of Richard and Sharon Mock.

Education: Graduated from Mannford High School, Mannford,  
Oklahoma in May, 1985; received Bachelor of Arts degree in  
Liberal Education from Langston University, Langston,  
Oklahoma in July, 1992, completed requirements for the  
Master of Science degree from Oklahoma State University,  
Stillwater, Oklahoma in May, 1995.

Experience: Raised in the country near Mannford, Oklahoma;  
employed in father's convenience store during the summers;  
employed by United Parcel Service as a Supervisor, 1988  
through 1991, employed by Oklahoma Natural Gas Company,  
1991 to present.