

A SURVEY OF MANAGEMENT TRAINING ACTIVITIES
IN MID-SIZED ORGANIZATIONS IN OKLAHOMA

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PREFACE

This description of management training in Oklahoma businesses and industries with 50-1000 employees began as a result of my exposure to organizations of that size and a seed planted by a good friend who noted the lack of organized training in those organizations.

As I searched for information about the training activities and needs in those organizations, the more convinced I became that their needs were not addressed in what seemed to be an active training market. More information so the organizations and suppliers of training could make sound training decisions seemed in order. At the same time, the State Department of Vocational-Technical Education was about to embark on a similar mission. They graciously agreed to support my dissertation study. I thank them for their enormous contribution to the study.

This study was complicated by the lack of good identification of state businesses and industries fitting in the selected population. Because the development of the list was a major part of the project and because the list was untested as to whether the businesses and industries were indeed valid and fit the population, the study can be considered a first attempt to collect this type data. I

hope this will not be the only attempt to give those businesses and industries attention in the area of human resource development.

As in all dissertation efforts, many helped smooth the way when the process became difficult. I am grateful to all of those who contributed to the study. They are listed in Appendix A.

Special thanks goes to Les Kauer for planting the seed that eventually became the study. I am deeply grateful to him for his contributions to the study and consistent encouragement to me. Two special friends, Melinda and Steve Howard came to my aid whenever I called. Steve, with word processing help, and Melinda, who has been through this process, continually gave their help, interest, and support. Gary Clure, my statistician, also deserves special recognition and thanks for his contributions to the study.

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Thank you seems inadequate for Dr. Gene Smith, my dissertation adviser. His assistance was invaluable. I am grateful for his appropriate scrutiny of every phase of the study, his steadfast encouragement, and the time he spent on the study. Most of all, I thank him for his patience with my impatience.

To my family, Dave, Dennis, Darren, goes a very special thanks for allowing me the freedom to explore and grow. Their love, support, and encouragement made it possible for me to realize this very important goal.

TABLE OF CONTENTS

Chapter	Page
I. INTRODUCTION.	1
Problem.	7
Purpose.	8
Research Questions	8
Significance of the Study.	8
Limitations.	10
Definitions.	11
Summary.	12
Organization of the Study.	12
II. REVIEW OF LITERATURE.	14
Background	14
Value of Management Training	15
Differences in Management Training Needs for Small and Large Organizations	19
Determining Appropriate Training	25
Methods of Training.	28
Sources of Training.	30
Summary.	31
III. METHODOLOGY	33
Questionnaire Development.	34
Development of the List.	37
Method of Analysis	38
Summary	41
IV. RESULTS	43
Research Question One.	45
Research Question Two.	50
Research Question Three.	55
Research Question Four	61
Research Question Five	62
Research Question Six.	62
Research Question Seven.	70
Summary.	74

Chapter	Page
V. SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS . . .	80
Summary.	80
Conclusions.	82
Recommendations.	85
BIBLIOGRAPHY	89
APPENDIXES	95
APPENDIX A - LIST OF CONTRIBUTORS.	95
APPENDIX B - QUESTIONNAIRE AND COVER LETTERS . . .	99
APPENDIX C - STANDARD INDUSTRIAL CODES USED IN THE STUDY.	106
APPENDIX D - TEST OF PROPORTIONS. MAIL RESPONDENTS AND TELEPHONE NON- RESPONDENTS	109
APPENDIX E - PUBLICITY LETTER AND NEWS RELEASES.	111

LIST OF TABLES

Table	Page
I. Responding Organizations by Size.	44
II. Responding Organizations by Type.	44
III. Organizations with a Staff Member Responsible for Management Training	45
IV. Organizations with a Staff Member Responsible for Management Training By Size of Organization	46
V. Organizations with a Staff Member Responsible for Management Training By Type of Organization	47
VI. Organizations with a Staff Member Whose Primary Responsibility Is Management Training	48
VII. Organizations with a Staff Member Whose Primary Responsibility Is Management Training. By Size of Organization.	49
VIII. Organizations with a Staff Member Whose Primary Responsibility Is Management Training. By Type of Organization.	50
IX. Organizations That Budget for Management Training.	51
X. Organizations That Budget for Management Training. By Size of Organization.	52
XI. Organizations That Budget for Management Training. By Type of Organization.	53
XII. Percent of Organizations Training More or Less than 50% of Their Managers. By Size of Organization	54

Table	Page
XIII. Percent of Organizations Training More or Less than 50% of Their Managers. By Type of Organization	55
XIV. Amount Spent on Management Training	56
XV. Amount Spent on Management Training By Size of Organization	57
XVI. Amount Spent on Management Training By Type of Organization	58
XVII. Adequacy of Manager Training.	59
XVIII. Adequacy of Manager Training By Size of Organization	60
XIX. Adequacy of Manager Training By Type of Organization	61
XX. What Interferes with Training	63
XXI. Knowledge of Managers' Training Needs By Size of Organization	64
XXII. Knowledge of Managers' Training Needs By Type of Organization	65
XXIII. Organizations That Perform Needs Assessments. By Size of Organization	66
XXIV. Organizations That Perform Needs Assessments. By Type of Organization	67
XXV. Criteria Determining Manager Training Needs	68
XXVI. Organizations That Evaluate Management Training. By Size of Organization	69
XXVII. Organizations That Evaluate Management Training. By Type of Organization.	70
XXVIII. Method of Training. Mean of Responses	72
XXIX. Source of Training. Mean of Responses.	73

CHAPTER I

INTRODUCTION

Human resource development (HRD) as corporate investment has become an issue in national productivity. Anthony Carnevale's report (1983) in the American Society for Training and Development National Issues Series emphasized training's overall impact on the national economy. Economic growth and productivity depend on human resources, not as consumers, but as resources for production. According to Carnevale most growth in national income and three quarters of productivity increases since 1929 are attributed to developing on-the-job expertise, reallocating labor, and increasing labor quality through education, training, and health care.

Economists have noted a shift "from natural and machine resources to acquired human skills as the basic building block of production" (Carnevale, 1983, p. 9). While earth resources (minerals, energy, food) accounted for 50 percent of the gross national product in 1890, today these same resources account for less than 10 percent. According to the Carnevale report, "human resources grew to account for more than four fifths of the nation's total economic output" (1983, pp. 9-10).

The national economy reflects productivity of human resources. An estimated 75 percent or more of the nation's productivity is attributed to the human factor (Morse, 1984). Estimates of the investment in formal employee training and development in 1980 run higher than \$30 billion (Carnevale, 1983). This is roughly half of the total dollars spent in traditional higher education (Morse, 1984).

While employers acknowledge the long term yield of investing in human resources, many approach the problem by competing with wages to attract expertise rather than investing in programs of human resource development. Carnevale (1983) asserted the well of developed expertise is going dry. Statistical evidence suggests growing skill shortages, shrinking American labor force quality and workmanship, and an increasing imbalance between worker productivity and maintenance and wages which is threatening our country's economic future (Carnevale, 1983). Naisbitt (1985, p. 5) asserted that "all potential employees between now and the end of the century have already been born." A lack of balance exists between developing "things" and developing people in the dollars spent in research and development.

Hersey and Blanchard (1977) said that in the United States only one of every thirty research and development dollars is spent in behavioral science areas. The

remainder is spent in developing "things." Regardless of the type or size of organization, managers need to develop human skill effectiveness in addition to technical job expertise. Effective management is essential to achieving organizational objectives. Developing management resources is a high yield corporate investment.

The fact that "big" organizations train and develop managers is readily apparent. According to Training Magazine's 1984 Industry Report, middle managers and first line supervisors in "big" organizations receive more training than any other employee. Those in top management positions were the most likely to receive training from outside the organization. First line supervisors and middle managers were most likely to receive their training in-house or from a combination of in-house and outside sources.

The comparative lack of management training in "small" organizations is a recognized cause for their failure. The 1983 President's report on small business projected a 50 percent failure rate within one year, primarily because of poor management.

Although perceptions of why small businesses fail differ (Edmunds, 1979), Dun and Bradstreet attributes over 90 percent of the failures to management-related deficiencies. Among other reasons given are lack of capital, inability to collect from customers, poor record keeping, unfair competition, union problems, and government

regulations (Hoad and Rosko, 1963). Perceptions of the owner and creditor of failed businesses differ as to why the business failed. A study of twenty firms with similar demographics showed bankrupt firms falling into 18 specific and avoidable management traps successful firms had avoided (Woodruff 1960).

Training's industry report (1984) stated that organizations with fewer than 50 employees do little formal training. This size organization has little management training, for "management" usually consists of the owner/manager with employees reporting directly to that person. Management training consists mostly of on-the-job training.

One person (owner/manager) can understand everything that happens in the business when the organization is a "manageable" size. Management becomes more difficult for one person as the organization grows. Pinchot (1985) states that entrepreneurs tend to "peak" at about 100-200 employees. Gorb (1978) further clarifies "manageable" by defining a large organization as a business which needs, or employs, a functional specialist to deal with "people" problems.

The person who deals with "people" problems often has human resource development responsibilities that include training. Training (1984) noted that the number of people an organization employs has a greater impact on HRD

activities than gross sales or assets. There are 16.8 million small businesses in the United States (Training, 1984). Do these organizations have training specialists? Do they train their managers? What criteria are used to categorize an organization as "small" or "large"?

Whether an organization is categorized as "large" is relative to its function. In the U.S. Department of Commerce "Survey of Current Business" (1959), "size" was a relative concept as size varies widely by industry. For example, a "large" service station has fewer employees than a "small" steel mill. The 50-999 category included roughly one third of all paid employment in each major industry. Organizations with fewer than 50 employees have the largest share of paid employment in wholesale and retail trades, contract construction, and service industries. A review of literature indicates that the terminology "small" or "large" dominates when categorizing organizations, but the definitions for both vary considerably depending on the source.

In a report on the White House Conference on Small Business (1980), Downing stated that the conference was "haunted" by the lack of a commonly accepted definition. The Small Business Administration (SBA) categorizes small business by number of employees, annual sales, or assets, depending on the type of organization. The Stanford Graduate School of Business categorizes "big" business as

organizations with 1000 or more employees (Harrell, 1975). A quantitative, rather than a functional and/or analytical, definition appears to be more appropriate for examining training activities in organizations.

The question is, What do organizations that are large enough to need a training program, but too small to support a full or part-time training specialist, do about management training? These mid-sized organizations are the "forgotten" group--forgotten in the respect that training, as delivered to large organizations, does not fit their needs, and often their training needs are not addressed by the Small Business Administration (SBA) or other support organizations.

The Assistant District Director for Business Development for SBA in Oklahoma, Jerry Reese, said in an interview that most of their management training is aimed at start-up businesses, entrepreneurs, and businesses during the first five years of existence. He conceded that the 50-1000 employee organization was a "forgotten" organization. In Oklahoma no single state agency is concerned primarily with the promotion and development of existing business (Betty, 1977). State and local community efforts aim at attracting large firms from outside the state.

While it was not the purpose of this study to attribute the business failure of smaller organizations to their need for management training, it is reasonable to speculate that

if large, successful businesses invest billions of dollars in training managers and do so because information, innovation, and managerial skills are keys to success (Solomon and Carhart, 1982), the smaller organizations have a need for similar advantages.

When management problems are addressed, the problems of the organizations with 50-1000 employees are more relevant to small, rather than large, organizations' management problems. The review of literature revealed little information that addressed mid-sized organization training and development resources or needs and since the number of employees in the mid-sized organization definition overlaps more with the definition frequently used for small organizations, it is logical to examine the peculiar management training needs of the small organization to determine the needs of the mid-sized organization.

Problem

Mid-sized organizations do not have adequate decision making information available concerning management training needs or preferences. Little attention has been paid to those organizations' training needs or preferences, yet many fall into the small business high failure rate attributed to poor management.

Purpose

The purpose of this study was to examine management training activities in organizations in Oklahoma with 50-1000 employees in order to provide more adequate information to those making management training decisions.

Research Questions

The generic question for this study was, What management training activities are taking place in the mid-sized organizations? Specifically the questions this study addressed were:

1. Do the organizations in the defined population have a training and development specialist?
2. Do they train their managers?
3. If so, how much training do they do?
4. How is that training delivered?
5. If they don't train, why not?
6. Do the organizations attempt to determine their managers' training needs?
7. What training preferences do these organizations have in regard to the type, sources, and methods of management training?

Significance of the Study

An examination of training activities in mid-sized organizations will benefit the organizations themselves and those who are interested in the maintenance, preservation, and productivity of those organizations. Organizations can

use the results of the study to identify strengths and weaknesses in management training in similar organizations, to determine areas of management training need, and to identify preferences for the source and methods of delivering the training. Those who offer management training will have a better understanding of how they might best assist mid-sized organizations in their management training efforts. Human resource development practitioners will have a better understanding of an area for management development that has virtually been ignored.

How does management training affect the economy? Solomon and Carhart (1982) cited government sources that suggest 200,000 businesses (half) that fail could be saved by appropriate management training and counseling before the situations become too critical to change. They further stated that another 800,000 could be strengthened and stabilized, while another 1,500,000 could grow substantially. These failures cost the American taxpayer more than \$4.8 billion annually in liabilities and lost revenue.

The American economy prospers when small business "starts" exceed small business "stops." To support each manufacturing enterprise, one wholesaler, seven retail stores, seven service concerns, five outside salespersons, and forty-five distributive employees are needed (Krentzman, White, and Shabacker, 1979). Vacant stores are a visible sign of the cycle created when a business fails.

Solomon and Carhart (1982, p. 51) asked, Will failing organizations "grope through the darkness of ignorance"? The Small Business Administration (1964) referred to the lost jobs and lost growth in failures as "unfired weapons in the cold war." John Donne's statement "Any man's death diminishes me, because I am involved in mankind" is applicable. Business failures diminish the business and economic structure of the community as a whole.

Oklahoma, according to the Center for Economic and Management Research, had 3,233 organizations with 50-1000 employees in 1983. According to Dun and Bradstreet (1985), 858 businesses and industries failed that same year. Enhancing the maintenance and productivity of existing businesses and industries would bolster the economic climate. One place to start is to assess the management training activities and determine training needs.

Limitations

This study was limited to a study of management training in businesses and industries in Oklahoma with 50-1000 employees. The organizations were categorized by type using the Standard Industrial Classification (SIC) code and by size using the same distribution as the Federal Bureau of Census.

Organizations in SIC Division I 82 Educational Services and in SIC Division J Public Administration, state and

federal levels, were not surveyed. This eliminated public and private schools, as well as state and federal agencies, from the survey. Because of their peculiar management training sources and needs, this prevented possible skewing of the survey results.

A verified list of the businesses and industries in the identified population did not exist. The study was limited to the list compiled by the researcher (described in Chapter III, Methodology).

The study described the management training within the organizations surveyed from the perspective of the person(s) filling out the questionnaire. The researcher did not attempt to evaluate the effectiveness or quality of training. The questionnaires were addressed to the chief executive officers of the organizations. If the organizations employed a person with training responsibility, that person possibly answered the questionnaire. The study was limited by the possibility of differences in interpreting the training adequacy in the organizations, depending on who completed the questionnaire.

Definitions

Mid-sized organization	An organization with 50-1000 employees.
Small organization	An organization with fewer than 50 employees.
Large (big) organization	An organization with 1000 employees or more.

Manager	Those who are in charge of a function(s), operation(s), or program(s), regardless of whether they have anyone reporting to them or not. THIS WOULD INCLUDE SUPERVISORS.
Management training	Any formal training (workshops, seminars, programs sponsored by the company) managers receive. THIS EXCLUDES ONE-ON-ONE OR ON-THE-JOB TRAINING.

Summary

Developing management skills is a human resource development issue that needs to be addressed in the mid-sized organization. Larger organizations train and develop managers. The lack of management training in smaller organizations contributes to their failure. The management training provided for the larger organizations does not fit the needs of the smaller organizations. The lack of information available about management training in mid-sized organizations complicates decision-making for management training. The purpose of this study is to survey management training in Oklahoma's mid-sized organizations to provide information for those making management training decisions.

Organization of the Study

Chapter I introduces the study, states the problem and purpose, outlines the research questions, and defines the limitations of the study. It also includes the definitions used in conducting the study.

Chapter II contains a review of literature relevant to the differences between management training and development in large and small organizations and the types and sources of management training and development for the smaller organization.

Chapter III describes the methods used in conducting the survey, particularly designing the questionnaire and identifying the organizations in the population.

Chapter IV reports the results of the survey. Chapter V includes the summary, conclusions, and recommendations for further study.

CHAPTER II

REVIEW OF LITERATURE

In an apocryphal debate between Homer and Hesiod regarding the wisest man in the world, Hesiod asked the blind Homer, "What is the mark of wisdom among men?" and Homer replied, "To understand the present and to plan for the future." (Harry Meacham's observation from Greek mythology in Success and Failure Factors in Small Business, p. 19)

Background

Management education and development designed for small firms is relatively new. Bauer (1978) noted that in 1952 there were only three texts in that educational area. The Small Business Administration was established in 1953. He called 1953-1970 the "staging years." Justin Longenecker, referring to the growth of small business education in the 1970s, attributed the growth to the \$250 per case per semester each school received to participate in the Small Business Institute Program (Bauer, 1978). It is safe to say, despite the evolvement of management education and training for small businesses, however, that the dearth of relevant programs continues as an issue.

President Carter mandated a conference on small business in 1980 with the purpose to "identify the many special

problems facing small business and design a course of action that can address these problems in a constructive way" (Downing, 1980, p. 4). None of the discussion papers prepared for the conference specifically addressed education and training from a broad or general perspective. One paper did discuss the Small Business Development Center's concept of on-the-job training and its community-level training programs (Downing, 1980). The grassroot meetings held to identify and address problem areas before the conference identified the lack of management assistance as one area of key importance.

Downing reported, however, that education, training, and management assistance emerged from the conference as a vital issue but not one of critical priority. In review of the conference preliminaries and proceedings, Downing said (p.6), "Education, Training and Assistance is without a doubt a critical area. It must be viewed as a priority area if small business is to be revitalized in this quarter century."

Value of Management Training

Prosperous companies in the future will be those who are best in fully using human resources. (Walker, 1969; Carnevale, 1983) As early as 1969, Walker asserted that managers have gotten along well in past decades hiring and training as needed, using short-range forecasts for

manpower needs, but times are changing in that highly skilled managerial and technical talent is becoming in short supply. The trial and error system of learning management techniques is a costly, time consuming method. That management training is a necessity appears to be an accepted doctrine in the internal administration of industry and government.

Danco (1979, p. 80) asserted that the typical businessperson learns how "to acquire, not to share; how to work, not to teach; and how to solve problems, not to ask for help from others" when facing a difficult or unsolvable problem. Educating managers brings realization that most of the problems are of the managers' own design-- particularly when they know the "technical" part of the business, but have had limited or no management experience.

In a study of factors contributing to the success and failure of small manufacturers, Hoad and Rosko (1964) found that higher education correlated with success, while lower education correlated with failure. A 1979 manpower study at Honeywell Corporation found significant correlations between management success and training (Zemke, 1985):

1. The ratio of how managers learn to manage from job experiences, relationships, and training is 50%-30%-20% rather than the 80%-10%-10% concluded from an earlier study.
2. Twenty percent of a manager's know-how comes from formal training (yet the average manager spends less than 1 percent of his/her time in training).

3. Managers contend that the training must be appropriately timed to have significant effect on them.

Why, then, is management development not a critical issue in the small to mid-sized organization?

What are factors affecting the dearth of training in smaller organizations? When Dun and Bradstreet asked a sample of small businesspersons if they would accept outside assistance or advice, 52 percent said they did not want advice from anybody. Their rationale was that outsiders were long on theory but short on practice. They preferred to make their own mistakes (Success and Failure Factors in Small Business, 1964). Meacham, the Dun and Bradstreet executive reporting the sample results, went on to say that although 75 percent of those businesspersons overpaid taxes, they did not accept advice from an accountant.

Another reason cited for lack of training was that it is a waste of time and money because the ones trained leave employment too soon to realize a return on the investment. The word "training" itself connotes regimentation and drill which is contrary to the entrepreneurial spirit (Krentzan, White, Schabacker, 1979). Although exciting short term results sometimes occur (Swaisland, 1975), the payback period on investments in management development may be longer than returns on capital investments.

In the Wall Street Journal's 1985 issue on "Small Business Management," Jolie Solomon related a successful

entrepreneur's transition into the role of manager of a growing enterprise. The excitement of being in the basement inventing and tinkering turned into lunches with investment bankers and reviews of proxy statements; the "old" way, i.e., informal communications, into a "new" way; tight personal control, into managing; doing things himself, into delegating; making all the decisions himself, into listening to advisers. As small becomes bigger, management needs become stronger.

The assertion that "we're too small--don't have time or money for such frills" is countered by such firms as Control Data Corporation who, at the very beginning, recognized and put into practice its philosophy that being successful in the long run, means training those key people needed to manage a growing enterprise and to handle the change and growing pains. They began with 11 employees (Swanson, 1963). The Small Business Administration also counters the idea of management training being a "frill" as it noted that management training postponed for lack of immediate noticeable return on investment is a long-range detriment to both the business and employees (Training for Small Business, 1976).

In a study of the value of management training programs, Barton-Dobenin and Hodgetts (1975) found the smaller organizations less enthusiastic than larger organizations about the effect of the training on a

manager's effectiveness for advancement or the manager's increased or renewed enthusiasm for his or her position. The smaller firms, however, were more enthusiastic about the effect the training had in reassuring managers about performing their jobs effectively. Both large and small firms felt the management training seemed to increase the manager's effectiveness in present positions.

Differences in Management Training Needs for Small and Large Organizations

That management training is important is generally accepted. That a "universal" management training is appropriate to any and all organizations is not generally accepted. Smaller organizations have management issues and problems that make the same approaches in management training used for larger organizations inappropriate.

(Cohn and Lindberg, 1974; Gorb, 1978; Gibb, 1983)

Understanding the differences between the management needs of large and small business can improve the training efforts in the smaller and mid-sized organizations.

Cohn and Lindberg said small firms are not "infantile" versions of large ones. Gibb said it is dangerous to assume the same approaches or mere adjustments to management training provided a large company will serve the needs of a smaller organization. Gorb went further in his assertion that only a small part of the body of

knowledge of management development is useful. He agreed with Gibb in that merely transferring the same to a smaller organization is harmful to the smaller organization. Small organizations have different problems; managers spend their time on different activities.

Gorb said management development programs originated to address large organization problems; therefore, management development became large company management development. Managers in large firms are specialists.

The proposition that managers in small firms are generalists rather than specialists has empirical support (Paolillo, 1984). Data from a sample of 352 managers representing a variety of organizations profiled the managers' jobs. The relative degree and mixture of the skills (technical, human, and conceptual) required by the particular manager depends on the manager's position in an organization (which is indirectly related to firm size).

Paolillo found that the roles of figurehead, entrepreneur, and spokesperson are more important to the manager in a small firm. Negotiator, disturbance handler, liaison, and resource allocator are roles more important to managers in large firms. Gibb (1983) summarized key influences of small size on management which are relative to the influence of size and ownership (p.4):

1. Very small management team.
2. Multi-functional roles for managers.
"Total" management.

3. Lack of specialist personnel. Often related to lack of resources.
4. Informal control systems.
5. Considerable scope for domination by leader.
6. Shortage of promotable manpower--no wide potential for management development.
7. Limited control of environment and limited resources to scan it.
8. Closeness of working group--conflicts resolved more easily or are more open. Higher loyalty.
9. Limited leverage to obtain capital from institutions.
10. Limited process technology (in scale).
11. Limited product range although great flexibility within range.
12. Limited market and usually limited market share.

The manager in the larger firm is in a much more controlled environment. (S)He need not have more than a superficial acquaintance with skills outside that environment. The smaller firm manager, on the other hand, needs to know a little about a lot. Larger firms have depth in management; smaller firms, "single-level" management. Individual mistakes in larger firms are seldom fatal. They can close a smaller firm. Managers in larger firms base decisions on organizational considerations; managers in smaller firms often cannot separate personal goals from organizational goals when making decisions. The larger firm budgets and plans ahead; the smaller firm is more immediate oriented. The larger firm operates a management development program from which it develops a pool of management talent. The smaller firm may consider teaching anyone the management of the business a threat. (Cohn and Lindberg, 1974; Success and Failure Factors, 1964)

Managers in larger firms can depersonalize success and failure in their controlled environment. Managers in smaller organizations often find it hard to separate where success and failure is not attributed to them personally. The smaller firm goals are often the personal goals of the manager. This affects small firm managers' attitudes toward management development.

Gibb asserted that the small firm manager may not be interested in education and training for its own sake because (s)he cannot separate the needs of the company from personal gain. Unlike the manager in a large firm who can gain in career terms, the small firm manager must see the relevance of management training to organizational problems.

The small firm manager wears many hats, is concerned with the immediate (take care of today; tomorrow will bring its own set of concerns), and is occupied with both internal and external factors. Gorb (1978, p. 27) used the analogy of a hunter or a nomad (small firm manager). The manager needs a different set of tools. (S)He needs to hunt rather than farm. Needs may include observing, but not at such a holistic or abstract level as to obscure plentiful, but small, prey; moving so as to avoid being locked in to a position that would obscure the way back; weapons, to allow the successes, but to allow them to go unnoticed; and companions who, like the manager, work well

in small groups without support services and are good at "walking when wounded." The small firm manager has to observe the uncontrolled environment to know where to begin, and although (s)he will not cultivate the swamp or jungle, (s)he can clear the treetops and clear the undergrowth from the swamp. The small firm manager's objective (Sutton, 1984) is to supply or sell a product or service. Anything that distracts from that may be thought to be dangerous. This includes maintenance, market surveys, and/or training.

One of the six success criteria for a small business cited by Apostolidis (1977) was developing managerial expertise. Characterizing successful small organization managers is important for determining appropriate management training and distinguishing them from their counterparts in large organizations. A study of owner/managers of twenty successful small businesses by Myrick (1977) revealed some striking similarities in views, attitudes, and personal characteristics, and emphasized differences between them and their larger organization counterparts.

The study, in part, sought to determine managers' view of themselves as "successful" managers and their managerial styles. Several of the characteristics are directly relevant in distinguishing the small and large organization manager:

1. They measured their success in relative, strictly personal terms.
2. They felt mastery over self and environment were prerequisites for success.
3. They had a broad perspective, i.e., they put situations into larger contexts, look at the larger situation, then answer the questions in smaller contexts meaningful to them.
4. They had a broad interest in business in general.
5. They had previous experience in the type of business they were operating. (Eighty percent had a minimum of five years experience.)
6. They were knowledgeable outside their own industry about the general state of the American economy.
7. They were hungry for business information.
8. They were constantly vigilant of changes in the economy.
9. They seemed to want more information as to inter-workings of their own firms.
10. They were aware of their interdependence with larger firms in their industry.
11. They insisted on talking on their own ground and no one else's.
12. Their view of change was that it was an opportunity to improve operations, not a challenge to survival.
13. They responded to change as a result of internal pressure--(70 percent) to redefine the basic business of their firms and narrow their scope of endeavor and to increase efficiency--not as a reaction to external forces.

Several of the characteristics identified in this study give further empirical support to Paolillo's assertion (1984) that managers in small firms are generalists rather than specialists. The managers in Myrick's study appeared to connect their holistic views and success.

If managers in smaller organizations are different from managers in larger organizations and if their significant roles are different, then it seems reasonable that the training they receive should also be different. How then should the training be different?

Determining Appropriate Training

Mager and Pipe (1970, p. v) said that "solutions to problems are like keys in locks; they don't work if they don't fit." Organizations with gaps between existing manager performance and desired manager performance search for solutions to fill the gap. Training managers is one alternative for closing the gap. Training, however, is not cost-effective or productive if it does not fill the gaps. The content, method of delivery, cost, and timing all have to match the need in order to fill the gap.

Imposing management training that fits large organizations on smaller organizations whose managers have different characteristics and roles does not work. This, in part, speaks to the issue of why small organizations do not train managers. How, then, can smaller organizations find training that will address their management training needs, and how can those who deliver the training meet the special needs of smaller organizations? There are three specific steps that need to be taken first:

Both the organization and the training resource need to:

1. Recognize the gap between existing manager performance and desired manager performance.
2. Clearly identify the desired skills or lack of skills.
3. Determine the outcomes desired of the training.

If training is the appropriate solution, then determining the appropriate training is the next step.

Dandridge and Sewall (1978) asserted that rather than concentrate on the problems causing small business failure, it is advantageous to look at problems operating managers experience to determine training needs. Although some of the areas they identify do contain multiple issues, their findings revealed that the most important decision problems facing the operating small business manager contained many factors that were outside their locus of control, and those problems dominated their attention.

Said and Hughey (1977) agreed with Dandridge and Sewall in identifying some of the same management problems. Said and Hughey chose the problems they identified from the ones most frequently cited as contributing to business failures. It appears that the problems causing business failures also are concerns of operating managers. Compare the problems considered important by Dandridge and Sewall and Said and Hughey:

Dandridge and Sewall:

Financing, cash management
 Understanding legislation
 Bill collection, customer credit
 Record keeping
 Preparing taxes
 Advertising, promotion,
 selling practices
 Planning, making decisions,
 managing
 Measuring market demand
 Training employees
 Prices
 Purchasing.

Said and Hughey:

Cash management
 Personnel
 Record keeping
 Merchandising
 Tax planning

Another interesting study of small business problems was an analysis by Kennedy, Loutzenhiser and Chaney (1979). Although the study was limited in its significance by the flaws in the investigative approach used by the student research teams, the results were congruent in some respects with the previous studies cited. The study was an effort to learn if a common set of problems was occurring among the Small Business Institute clients of the student consultants. Problems with the highest frequency of occurrence were in the categories of accounting and financial information, marketing, resource management, and planning.

Thomas and Sireno (1980) equated the training need of middle-management positions in larger manufacturing organizations with the needs of small business managers. Their study was to identify core competencies for in-service or two-year mid-management programs. Their findings were that communication, planning, and organizing skills are important to both groups. Staffing and administering skills are more important for the small business managers. This study substantiated the findings of Dandridge and Sewall (1978). Again accounting and financial information, marketing, resource management, and planning were categories that reappeared as needs.

Assessing the problems small business managers face is the first step in a strategy for solving the problems.

Often the managers need so much, they do not know where to begin. A planned strategy for identifying performance criteria is a beginning. A systematic approach to the solution will provide credibility that often deters a smaller organization from taking the training plunge. Sutton (1984, p. 28) listed skills a firm should look for in a trainer/consultant in order for the organization to gain maximum effectiveness. The ability to:

1. Gain the confidence of management.
2. Include the top managers in the problem solving process and training.
3. Analyze the company situation quickly to identify the most critical needs.
4. Act as adviser.
5. Assess the amount of time needed to tackle the solution.
6. Supply (personally, or from others) the skills necessary to solve the problem.

By involving management in the process of identifying the need and even in the training process, the supplier of the training will more likely tailor the approach to the specific needs of the organization.

Methods of Training

Another reason smaller organizations do not train managers is that the approach is too often an academic approach and more theoretical than practical. That issue presents a dilemma.

The organization wants practical application; educational institutions, who have been a frequent economical provider of training for smaller organizations,

often label work with small firms as "academically unacceptable" (Gibb, 1983, p. 35). Educational institutions often find the time and cost involved in tailoring programs to individual needs not worth the academic sacrifice. Providing "programmed" approaches to management training is less costly and time-consuming for the provider, but does not offer the problem-centered, flexible approach needed to be applicable on the job.

Small organizations do not provide the lucrative enticements to providers of management development that large organizations offer. A needs analysis is costly and time-consuming to conduct. Tailoring the training to individual needs is also costly and time-consuming. These are issues that limit quality resources available to smaller organizations and deter them from seeking training. These are pitfalls Gibbs (1983) said limit the supply of small business management training and education.

The methods most suited to small business management development should have a multipurpose goal: to build a wide variety of management skills in a few people, up-date relevant knowledge, and build recruiting skills and ability to develop employees into versatile employees (Swaisland, 1975). The methods McNulty (1969) and Luchsinger (1977) suggested are:

Field studies--(observe to identify problems)
 Incident------(select pertinent data)
 Case------(diagnose and solve problems)
 Simulation------(make decisions)

Role play----- (communicate)
 Group projects- (motivate)

Methods are active rather than passive, experiential rather than theoretical. Because small organization managers are required to "wear many hats," the key to applicable training is to enable them to take a team/task orientation to problem solving. That approach would allow them to tap resources for a more flexible response to multiple tasks and situations as they arise.

Sources of Training

What then is available to smaller organizations for management training? Restrictions include limited company resources, no in-house specialists, little time, and limited budgets. Several sources are available and offer opportunities for development.

Trade associations, by virtue of their homogeneous specialization and interests, offer an excellent source. Oklahoma has some 250 trade associations and organizations. Most engage eagerly in legislative activities. Those that have also engaged in educational activities have attracted more and better members, increasing incomes and making possible reduced-cost business programs (Krentzman, et al., 1979).

Chambers of Commerce offer another source. Local chambers have a vested interest in the productivity of their economic climate. Acting as a catalyst for

educational activities would enable them to promote productivity. Oklahoma has some 189 active chambers.

Vocational-technical schools and community/junior colleges offer another valuable source. Their missions are to provide community service. Oklahoma has 24 area vocational-technical schools. The assistant state director of Oklahoma vocational-technical schools said 124,900 adults enrolled in short-term adult training programs in 1984-1985. Oklahoma also has 18 community/junior colleges which provide short-term adult educational programs.

Group training schemes also serve the needs of smaller organizations. Such consortiums provide services to members of the group that members can not economically afford as an individual organization. Some act virtually as the members' personnel department. (Hay, 1979; Howell and Box, 1978)

These sources are in addition to colleges and universities and private suppliers who have traditionally offered the management development sought by larger organizations. The question is, Will the organizations recognize the need as critical enough to be persistent?

Summary

Small and mid-sized businesses have special needs that until recently have not been addressed by education and training. One result emerging from the 1980 White House

Conference on Small Business was that education and training is a vital, if not critical, issue. Organizations without the benefit of a part-time or full-time training specialist are those who face the greatest need. The value of management training to organizational productivity and effectiveness is recognized by organizations of all sizes.

Management training appropriate for large organizations does not fit small to mid-sized organizations' needs. These organizations have different problems, and their managers' time is spent on a wider variety of problems than managers in large organizations. The applicability of training is very important to the small to mid-sized organization. Managers in training in large organizations may use the training for future career advancements, while managers in training in small to mid-sized organizations use it for immediate problem solving.

Determining appropriate subjects and a practical approach to the subject are two keys to successful training and educational programs for small to mid-sized organizations. The application must be oriented toward problem solving for them to invest time and dollars in training managers. To provide credibility, the source of training must show a close interest in the specific needs of that size organization.

CHAPTER III

METHODOLOGY

The primary purpose of this study was to examine management training activities in mid-sized organizations in Oklahoma. The results of the study will be useful to decision makers in organizations of that size who want to know what kind of management training is going on in similar businesses and industries and what their preferences are for management training.

In particular, the Oklahoma State Department of Vocational-Technical Education's Business and Industrial Training Services (BITS) Division expressed a direct interest in such a study since they provide management development services for the segment of businesses that the study proposed to survey. The study was supported by the Oklahoma State Department of Vocational-Technical Education.

The questionnaire administered by mail was developed from the objectives of the study listed in Chapter I. This chapter is divided into three parts: part one discusses the development of the questionnaire; part two, the development of the population list; part three, the methods used in compiling the results of the study.

Questionnaire Development

A review of various needs assessment instruments and related research did not reveal an instrument suitable for the purposes of this study. As a result, the researcher developed a series of questions adapted from a literature review and submitted the questions for critique to 28 professionals and representatives of the population to be studied. The reviewers were identified through the American Society for Training and Development and the training and development activities in which the researcher participates.

Few studies describe management training activities in mid-sized organizations. When designing the questionnaire, the researcher was guided by the following considerations:

1. Organizations that are large enough to have managers other than the owner but too small to support a part-time or full-time training specialist have similarities in management training needs.
2. Most managers in mid-sized organizations have preferences for the type and source of management training.
3. Organizations with more than 1000 employees have a greater need for a training specialist. Their management structure would most likely be indicative of a large organization.
4. Organizations with fewer than 50 employees have an owner/manager who is the policy/decision maker. Management training would not affect those organizations as it does an organization that has more than one person affecting policies/decision.

The first draft of the questionnaire was critiqued by the researcher's dissertation adviser, the State Vocational-Technical Department's Research Division director, a statistician, and the researcher's doctoral committee. It was then pilot tested in ten organizations representative of the defined population. (See Appendix A for contributors to the study.)

After the pilot test, it was tested and retested in ten organizations for reliability using Kendall's Tau and Spearman's Rank Order correlation. All items had a correlation above .60 except for items #2 and 6 under question 12, items #2, 5, 6, and 8 under question 16, and two items (ranking in-house training and private consulting/training firms as to preference) in question 20, part B.

Part of the lack of consistency in the test/retest answers of those items can be explained by the time lapse between administering the test and retest and the format of the questionnaire in its preliminary form. In two of the organizations, the training conditions did change between the times the questionnaire was answered. The format of the questions also contributed to the respondent's potential for inadvertently answering the question on the wrong line. The final refinement and reformatting of the questionnaire eliminated the problems contributing to the lack of consistency.

The questionnaire was further refined by a team of seven subject matter experts in management training, research, and statistics. These were two private management consultants, a professor of management and adult education, a director and assistant director of economic and management research, a director of vocational-technical research, and a vice-president of human resource development in an organization representative of the defined population. These subject matter experts compared the questionnaire to the purpose of the study and research questions. They attested to the validity of the questionnaire to gather the information needed to meet the purpose of the study, i.e., describe the management training activities taking place in organizations of the defined population and their training preferences.

The questionnaire was designed to answer the research questions:

Questionnaire Question	Answered Research Question
#6	#1
#5 #8	#2
#5 #8-11	#3
#7	#4
#16	#5
#12-15 #21	#6
#19 #20 #22	#7

Nonresponse is a frequent problem encountered by those using questionnaire mail surveys, especially when the questionnaire is long. The researcher anticipated this problem and used methods suggested by several sources (Key,

1985; and Robinson and Agisim, 1951) to counter nonresponse as much as possible. Methods used to encourage response were the pencil included in the first mailing, the professional appearance of the questionnaire, the design of the questionnaire for ease in completing, the cover letter, and publicity through the State Chamber of Commerce and news releases.

Development of the List

A validated list of businesses and industries with 50-1000 employees was not available to initiate this study. All Standard Industrial Code (SIC) categories except private and public schools and state and federal agencies were to be included. As a result, the development of the population list was a significant part of the project.

The Oklahoma State Department of Vocational-Technical Education had a two-year-old list of employers approximating the population. This list formed the basis for the population. Because smaller organizations tend to be transient, the researcher refined the list using two other primary sources.

The Oklahoma Economic Development Department annually publishes a Directory of Manufacturers and Products. This list provided a portion of the SIC categories. The State Chamber of Commerce provided a list of the 189 Chambers of Commerce across the state. All 189 chambers were called.

They were asked to send a list of organizations within the population. All information submitted by the responding chambers was used.

The final list was a combination of these sources. A proportioned random sample of the population formed the list of participants selected for the survey. The sample was proportioned according to the distribution of organizations within the State Vocational-Technical Area School Districts. In order to obtain a proportioned sample from area school districts with few organizations employing 50-1000, 70 percent of the population or 1500 was specified.

Method of Analysis

The first mailing of the questionnaire resulted in 216 (14.40 percent of 1500 mailed) usable responses. Of the 1500 questionnaires mailed, 61 (4 percent) were either duplications or returned undeliverable. Of those returned completed, 48 (3 percent) were organizations that did not fit into the defined population. The researcher determined a second mailing was needed to increase the significance of the results.

A second mailing to the 1170 nonrespondents was completed six weeks later. The second mailing resulted in 164 (14 percent) usable responses. Ten (.8 percent) were either duplications or returned undeliverable. Of those returned by respondents, 74 (6 percent) were organizations that did not fit in the defined population.

Of the original 1500 questionnaires delivered (1428), 503 were returned. The researcher accounted for 38 percent (575) of the organizations on the original list of 1500 through either a response or an undelivered return. Of the 35 percent response (503 of 1428), 380 (27 percent) fit into the 50-1000 employee population.

According to Borg and Gall, 1983; Des Raj, 1972; and Gay, 1981, a usual approach for dealing with nonresponse is to determine if respondents and nonrespondents are significantly different in any way. One method of determining this is by selecting a small random sample of the nonrespondents. An abbreviated version of essential items from the original questionnaire is used to interview the nonrespondents.

Using these accepted procedures, the researcher conducted telephone interviews of a ten percent random sample of those not responding. Of the 95 nonrespondents in the telephone random sample, 15 had nonworking numbers and 12 resulted in no response (28.4 percent). Of those reached successfully, 48 (50.6 percent) were in the 50-1000 population; 20 (21 percent) were not.

A test of proportions (Glass and Stanley, 1970) was used to determine if those in the population of respondents and those in the population of nonrespondents possessed similar characteristics. This was tested at the .01 level of significance with the probability of making a Type I error set at 99 percent ($z = \pm 2.57$). (See Appendix D.)

The test of proportions confirmed that those interviewed by telephone were not significantly different from those responding to the mailed questionnaire. Generalizations may be made to the population, except for one group.

The significant difference was between the mining/construction/agriculture respondents and nonrespondents. One explanation for this difference might be the state of the economy in Oklahoma at the time of the study. Oil, gas, and agriculture are in that SIC code. Those are the state's major businesses and industries, and also were the industries and businesses most sharply experiencing the downturn in economy at the time of the study. This might preclude those organizations from attention to training and development issues, thus the nonresponse to the questionnaire. Generalization to that group was not made in the study.

All data were entered from questionnaires returned by organizations within the 50-1000 employee population. The questionnaires were edited for reasonableness. Rank of frequencies and percentages of response were used in the analysis. Means were calculated where appropriate. Many of the answers were cross tabulated with organization size and SIC code. Each question was analyzed based on the number of responses to that particular question since all respondents did not answer all questions.

Summary

This chapter described the methods used in the study. The questionnaire development, development of the list, procedures used to conduct the survey, and methods of analysis are discussed.

Since an existing instrument suitable for the study was not available, the researcher developed a questionnaire. The questionnaire was tested for reliability and validity. It was pilot-tested in ten organizations, and 28 professionals and representatives of the population to be studied reviewed it.

A validated list was not available to initiate the study. The researcher compiled a list of the businesses and industries employing 50-1000 employees from three sources: a two-year-old list approximating the population, the Directory of Manufacturers and Products published annually by the Oklahoma Economic Development Department, and lists submitted by the state chambers of commerce responding to a telephone request for information.

The researcher mailed 1500 questionnaires followed by a second mailing (1170) six weeks later. A telephone follow-up of nonrespondents and a test of proportions between those responding by mail and by telephone revealed no significant difference between the respondents and non-respondents except for one category. No generalizations

were made in the study to this category: the mining-construction-agriculture SIC category.

Means, frequencies, percentages, and cross tabulations between questions were used to analyze the responses to the questionnaire.

CHAPTER IV

RESULTS

The results of the study are divided into seven sections. The seven sections are the seven research questions for the study: (1) Do the organizations in the defined population have a training and development specialist? (2) Do they train their managers? (3) If so, how much training do they do? (4) How is that training delivered? (5) If they don't train, why not? (6) Do the organizations attempt to determine their managers' training needs? (7) What training preferences do these organizations have in regard to the type, source, and methods of management training?

Of the 1500 questionnaires mailed, 503 were returned. Out of the 1500, 72 were either duplicates or returned undeliverable. A total of 380 (27 percent) completed and returned questionnaires fit into the 50-1000 employee population. The analysis is based on those 380 responses.

Of those reporting, 54.7 percent indicated they were independent operations, 29.2 percent were branches or divisions, and 15 percent were subsidiaries. Tables I and II below show the distribution of the 380 responding organizations by size and type.

TABLE I
RESPONDING ORGANIZATIONS BY SIZE

Size	Frequency	Percent of Total
50-99	163	43.0
100-249	138	36.3
250-499	64	16.8
500-999	15	3.9
Total	380	100.0

TABLE II
RESPONDING ORGANIZATIONS BY TYPE

Type	Frequency	Percent of Total
Manufacturing	139	36.5
Banking/Finance/Insurance	36	9.5
Transportation/Communications/ Utilities	28	7.4
Business Services	29	7.6
Retail Trade	39	10.3
Public Administration	46	12.1
Health Services	23	6.1
Mining/Construction/Agriculture	18	4.7
Wholesale Trade	14	3.7
Other	8	2.1
Total	380	100.0

Research Question One

Do the organizations in the defined population have a training and development specialist? Question six on the questionnaire was designed to gather that information. It was divided into two parts. Part A asked, Do you have a staff member who administers or coordinates management training? If so, what is that person's title? Those responding (n=370) were almost equally divided: 49.7 percent said yes; 50.3 percent answered no. (See Table III.) Those responsible for training were most frequently (76 percent) in positions identified as training, personnel, vice president, human resources, or manager.

TABLE III

ORGANIZATIONS WITH A STAFF MEMBER RESPONSIBLE
FOR MANAGEMENT TRAINING

	Frequency	Percent of Total	Percent of Respondents
Yes	184	48.4	49.7
No	186	48.9	50.3
No response	<u>10</u>	<u>2.6</u>	<u>00.0</u>
Total	380	100.0	100.0

A cross tabulation of the size of the organizations with whether they have a staff member responsible for management training indicated about an even division between those who did and those who did not for organizations employing 50-499 employees. Of those employing 500-999 employees, 80 percent of the respondents indicated that they did have a staff member responsible for management training. (See Table IV.)

TABLE IV
ORGANIZATIONS WITH A STAFF MEMBER RESPONSIBLE FOR
MANAGEMENT TRAINING. BY SIZE OF ORGANIZATION

Size	Yes %	No %
50-99	43.9	56.1
100-249	49.6	50.4
250-499	57.4	42.6
500-999	80.0	20.0
n=370		

A cross tabulation of type of organizations with whether they have a staff member responsible for training indicated about an even division between those who did and those who did not, except for banking/financial/insurance, retail trade, and public administration. Public

administration most strongly indicated they did not have a staff member responsible for training. Banking/financial/insurance and retail trade most strongly indicated they did. (See Table V.)

TABLE V
ORGANIZATIONS WITH A STAFF MEMBER RESPONSIBLE FOR
MANAGEMENT TRAINING. BY TYPE OF ORGANIZATION

Type of Organization	Yes %	No %
Manufacturing	48.1	51.9
Banking/Financial/Insurance	62.9	37.1
Transportation/Communication/Utilities	53.6	46.4
Business Services	44.8	55.2
Retail Trade	71.1	28.9
Public Administration	34.9	65.1
Health Services	43.5	56.5
Mining/Construction/Agriculture	35.3	64.7
Wholesale Trade	42.9	57.1
Other	62.5	37.5

Part B of question 6 asked, Is training his/her primary responsibility? To whom does that person report? Only 11 percent said training was the major responsibility of the person administering or coordinating training. (See Table VI.) The persons to whom the trainers most frequently (79 percent) reported were a senior manager, a senior vice president, the company president, or the owner.

TABLE VI
 ORGANIZATIONS WITH A STAFF MEMBER WHOSE PRIMARY
 RESPONSIBILITY IS MANAGEMENT TRAINING

	Frequency	Percent of Total	Percent of Respondents
Yes	30	7.9	11.0
No	242	63.7	89.0
No response	<u>108</u>	<u>28.4</u>	<u>00.0</u>
Total	380	100.0	100.0

A cross tabulation of the size of the organizations with whether they have anyone whose primary responsibility is training indicated a consistent no, but as the organizations were larger, the percent of those indicating yes significantly increased. Organizations with 500-999 employees indicated that 23 percent employed someone with management training as a primary responsibility. (See Table VII.)

TABLE VII
 ORGANIZATIONS WITH A STAFF MEMBER WHOSE PRIMARY
 RESPONSIBILITY IS MANAGEMENT TRAINING
 BY SIZE OF ORGANIZATION

Size of Organization	Yes %	No %
50-99	9.2	90.8
100-249	8.9	91.1
250-499	17.9	82.1
500-999	23.1	76.9
n=272		

A cross tabulation of the type of organizations with whether they have a person whose responsibility is training indicated a consistent no. Transportation/communication/utilities, business services, and retail trade indicated a greater percent of yes. Wholesale trade indicated a 100 percent no. (See Table VIII.)

TABLE VIII
 ORGANIZATIONS WITH A STAFF MEMBER WHOSE PRIMARY
 RESPONSIBILITY IS MANAGEMENT TRAINING
 BY TYPE OF ORGANIZATION

Type of Organization	Yes %	No %
Manufacturing	10.0	90.0
Banking/Finance/Insurance	6.1	93.9
Transportation/Communications/Utilities	21.7	78.3
Business Services	14.3	85.7
Retail Trade	14.7	85.3
Public Administration	7.1	92.9
Health Services	6.7	93.3
Mining/Construction/Agriculture	9.1	90.9
Wholesale Trade	0.0	100.0
Other	28.6	71.4

Research Question Two

Do organizations train their managers? Questions five and eight on the questionnaire were designed to answer this question.

Question five asked, Does your company budget for management training? Of those responding, 56.6 percent answered yes and 43.4 percent answered no. (See Table IX.)

TABLE IX
ORGANIZATIONS THAT BUDGET FOR MANAGEMENT TRAINING

	Frequency	Percent of Total	Percent of Respondents
Yes	213	56.1	56.6
No	163	42.9	43.4
No response	<u>4</u>	<u>1.1</u>	<u>00.0</u>
Total	380	100.0	100.0

A cross tabulation of the size of the responding organizations with whether they budgeted for management training showed that larger organizations more frequently budgeted for training. (See Table X.) Organizations with 50-99 employees were about evenly divided between those who did (48.4 percent) and those who did not (51.6 percent) budget for training. Organizations with 100-249 employees were almost evenly divided between those who did (56.9 percent) and those who did not (43.1 percent) budget for training. Organizations with 250-999 employees indicated that 73 percent did budget for training and 27 percent did not.

TABLE X
 ORGANIZATIONS THAT BUDGET FOR MANAGEMENT TRAINING
 BY SIZE OF ORGANIZATION

Number of Employees	Yes %	No %
50-99	48.4	51.6
100-249	56.9	43.1
250-499	73.0	27.0
500-999	73.3	26.7
n=376		

A cross tabulation of the type of organizations with whether they budgeted for management training indicated about an even division between those who did and those who did not for manufacturing, banking/finance/insurance, and public administration. Transportation/communications/utilities indicated the largest percentage that budgeted for training; health services and retail trade were next. Wholesale and business services indicated the largest percentage of those who did not budget for management training. (See Table XI.)

TABLE XI
 ORGANIZATIONS THAT BUDGET FOR MANAGEMENT TRAINING
 BY TYPE OF ORGANIZATION

Type of Organization	Yes %	No %
Manufacturing	57.2	42.8
Banking/Finance/Insurance	55.6	44.4
Transportation/Communications/Utilities	71.4	28.6
Business Services	37.9	62.1
Retail Trade	61.5	38.5
Public Administration	58.1	41.9
Health Services	69.6	30.4
Mining/Construction/Agriculture	38.9	61.1
Wholesale Trade	35.7	64.3
Other	75.0	25.0

Question eight asked, What percent of your managers received training this past year? The mean of those responding (n=316) was 59 percent.

A cross tabulation of the size of the organizations and the percentage of their managers trained indicated that the size of the organizations made little difference in the percentage of their managers trained. (See Table XII.)

TABLE XII
 PERCENT OF ORGANIZATIONS TRAINING MORE OR LESS
 THAN 50% OF THEIR MANAGERS
 BY SIZE OF ORGANIZATION

Size of Organization	More than 50% %	Fewer than 50% %
50-99	54.6	45.4
100-249	50.8	49.2
250-499	51.7	48.3
500-999	58.4	41.6
n=316		

A cross tabulation of the type of organizations and the percentage of their managers receiving training indicated about an even division between those who trained more than 50 percent of their managers the past year and those who did not. A significant percentage of public administration (65.6) and business services (64.3) indicated they trained more than 50 percent of their managers. A significant percentage (66.7) of wholesale trade indicated they trained less than 50 percent of their managers. (See Table XIII.)

TABLE XIII
 PERCENT OF ORGANIZATIONS TRAINING MORE OR LESS
 THAN 50% OF THEIR MANAGERS
 BY TYPE OF ORGANIZATION

Type of Organization	More than 50% %	Fewer than 50% %
Manufacturing	46.4	53.6
Banking/Finance/Insurance	41.3	58.7
Transportation/Communications/ Utilities	47.8	52.2
Business Services	64.3	35.7
Retail Trade	59.5	40.5
Public Administration	65.6	34.4
Health Services	59.1	40.9
Mining/Construction/Ag.	57.1	42.9
Wholesale Trade	33.3	66.7
Other	85.7	14.3

Research Question 3

If the organizations train their managers, how much training do they do? Questions 5 and 8-11 on the questionnaire were designed to answer this question.

Answers to questions 5 and 8 (above) indicated that about 60 percent of the responding organizations' managers received training and that the larger companies were the ones that tended to budget for the training. Whether the organization budgeted for training was mixed according to type of organization. The size of the organization seemed to have less effect on the number of managers trained than the type of organization.

Question 9 on the questionnaire asked, How much did you spend training managers this past year? Of those responding, 40.1 percent spent under \$2000; 29.2 percent spent \$2,000-\$5,000; 15.9 percent spent \$5,000-\$10,000. (See Table XIV.)

TABLE XIV
AMOUNT SPENT ON MANAGEMENT TRAINING

Amount Spent	Frequency	Percent of Total	Percent of Respondents
Under \$2,000	144	37.9	40.1
\$ 2,000-5,000	105	27.6	29.2
\$ 5,000-10,000	57	15.0	15.9
\$10,000-20,000	21	5.5	5.8
Over \$20,000	32	8.4	8.9
No response	21	5.5	00.0
Total	380	100.0	100.0

A cross tabulation of the size of the organization with the amount spent on training indicated that the larger the company, the larger the expenditure for training. (See Table XV.) Of the 359 organizations responding to this question, 149 employed 50-99; 134 employed 100-249; 63 employed 250-499; 13 employed 500-999. Almost half (6) of the organizations employing 500-999 spent over \$20,000 on training. Almost half (71) of the organizations employing

50-99 spent less than \$2,000. The organizations employing 100-249 spent \$10,000 or less (91 percent). Of the organizations employing 250-499, 49.2 percent spent \$5,000 or below; 34.9 percent spent \$10,000 or above.

TABLE XV
AMOUNT SPENT ON MANAGEMENT TRAINING
BY SIZE OF ORGANIZATION

Size	Under \$2K %	\$2-5K %	\$5-10K %	\$10K-20K %	Over \$20K %
50-99	47.6	33.6	11.4	4.7	2.7
100-249	39.5	29.9	21.6	3.0	6.0
250-499	27.0	22.2	15.9	12.7	22.2
500-999	23.1	7.7	7.7	15.4	46.1

n=359

A cross tabulation of type of organizations and what they spent on training indicated that wholesale trade spent the least. Banking/finance/insurance and transportation/communications/utilities spent the most. Although a significant number (69.6 percent) of health services indicated they budgeted for training, 63.7 percent indicated they budgeted less than \$5,000. Not only did wholesale trade say they did not budget for management training, but also they indicated they spent little on the training. More than 60 percent of all the types of

organizations indicated they spent less than \$5,000 on management training. (See Table XVI.)

TABLE XVI
AMOUNT SPENT ON MANAGEMENT TRAINING
BY TYPE OF ORGANIZATION

Type of Organization	Under \$5,000 %	\$5K-\$10K %	More than \$10,000 %
Manufacturing	66.2	19.5	14.3
Banking/Finance/Insurance	63.5	15.2	21.3
Transportation/Communications/ Utilities	62.5	16.7	20.8
Business Services	62.1	20.7	17.2
Retail Trade	71.8	15.4	12.8
Public Administration	77.5	10.0	12.5
Health Services	63.7	22.7	13.6
Mining/Construction/Ag.	88.2	00.0	11.8
Wholesale Trade	92.9	7.1	00.0
Other	75.0	00.0	25.0

Question 10 on the questionnaire asked, How many hours did your managers spend in training this past year? The mean was 237.61.

The mean percent of managers receiving training was 59.19. The mean number of managers in the organizations was 20. The mean number of managers receiving training was 12. The mean number of total hours a manager spent in training was 20.

Question 11 on the questionnaire asked, Do you feel your managers receive adequate training? Those responding indicated the training was fairly adequate (60.8 percent). Another 27.5 percent felt the training was inadequate. Only 11.7 percent felt the training was "very adequate." (See Table XVII.)

TABLE XVII
ADEQUACY OF MANAGER TRAINING

	Frequency	Percent of Total	Percent of Respondents
Inadequate	94	24.7	27.5
Fairly Adequate	208	54.7	60.8
Very Adequate	40	10.5	11.7
No response	38	10.0	00.0
Total	380	100.0	100.0

A cross tabulation of the size of the organization with adequacy of training indicated larger organizations were least satisfied with management training adequacy. None of the organizations with 500-999 employees indicated the training as "very adequate." Organizations with 250-499 employees were closely divided between inadequate (40.7 percent) and fairly adequate (55.9 percent). Organizations

with fewer than 250 employees indicated fairly adequate manager training. (See Table XVIII.)

TABLE XVIII
ADEQUACY OF TRAINING BY SIZE OF ORGANIZATION

	50-99 %	100-249 %	250-499 %	500-999 %
Inadequate	22.6	27.2	40.7	25.0
Fairly Adequate	63.7	58.4	55.9	75.0
Very Adequate	13.7	14.4	3.4	00.0
n=342				

A cross tabulation of type of company with the adequacy of management training indicated the majority felt training was fairly adequate. Public administration (23.1 percent) was the most satisfied. Wholesale trade (60 percent) was the least satisfied. No respondents from either wholesale trade or health services indicated training was "very adequate." (See Table XIX.)

TABLE XIX
ADEQUACY OF TRAINING. BY
TYPE OF ORGANIZATION

Type of Organization	Inadequate %	Fairly Adequate %	Very Adequate %
Manufacturing	34.1	54.8	11.1
Banking/Finance/Insurance	15.2	69.6	15.2
Transportation/Communications	20.0	76.0	4.0
Utilities			
Business Services	24.1	65.6	10.3
Retail Trade	24.3	62.2	13.5
Public Administration	25.6	51.3	23.1
Health Services	25.0	75.0	00.0
Mining/Construction/Ag.	26.7	53.3	20.0
Wholesale Trade	60.0	40.0	00.0
Other	00.0	100.0	00.0

Research Question 4

How is the training delivered? Question 7 on the questionnaire--how are the managers being trained?--was designed to answer this question. Ranked in order of priority, the respondents indicated the following sources of training programs:

1. 65.1% In-house, company developed and presented training programs.
2. 47.4% Off-site, private firm developed and presented training programs.
3. 32.1% Training delivered by a college/university.
4. 26.1% In-house, private firm developed and presented training programs.
5. 23.9% Off-site, company developed and presented training programs.
6. 23.4% Training delivered by a vocational-technical school

7. 9.5% Other--Associations and professional organizations most frequently mentioned.

Research Question 5

If they don't train, why not? Question 16 on the questionnaire asked, What interferes with your managers' receiving training? Most frequently cited was time it takes to train (44 percent). Second most frequently cited was location of training (30 percent). Cost of training was third under "frequently" (24 percent). Cited first under "some" was cost of training (56 percent). Time, cost, and location were the top three under "frequently" and "some," with cost number one, location number two, and time number three under "some." Cited least for interference in training was manager unwillingness. (See Table XX, page 63.)

Research Question 6

Do the organizations attempt to determine their managers' training needs? Questions 12-15 and 21 were designed to answer this question.

Question 12 asked, Do you know what your managers' training needs are? On a scale of 1 (no) to 5 (yes), the mean was 3.68. More of the respondents said they knew their managers' training needs (94.1 percent "somewhat" to "yes") than said they did not know their managers' training needs (5.9 percent "somewhat" to "no").

TABLE XX
WHAT INTERFERES WITH TRAINING

	Frequency	Percent of Total	Percent of Respondents
Time			
Frequently	146	38.4	44.1
Some	160	42.1	48.3
Not at all	25	6.6	7.6
No response	49	12.9	00.0
Cost			
Frequently	77	20.3	24.4
Some	175	46.0	55.6
Not at all	63	16.6	20.0
No response	65	17.1	00.0
Location			
Frequently	94	24.7	30.4
Some	161	42.4	54.1
Not at all	54	14.2	17.5
No response	71	18.7	00.0
Training unavailable			
Frequently	60	15.8	21.1
Some	136	35.8	47.7
Not at all	89	23.4	31.2
No response	95	25.0	00.0
Lack of planning time			
Frequently	56	14.7	19.3
Some	134	35.3	46.2
Not at all	100	26.3	34.5
No response	90	23.7	00.0
Lack of staff to train			
Frequently	66	17.4	23.3
Some	111	29.2	39.3
Not at all	106	27.9	37.4
No response	97	25.5	00.0
Manager unwillingness			
Frequently	14	3.7	4.9
Some	88	23.2	31.0
Not at all	182	47.8	64.1
No response	96	25.3	00.0
No one to coordinate			
Frequently	45	11.8	16.1
Some	105	27.6	37.5
Not at all	130	34.2	46.4
No response	100	26.3	00.0
n=380 percents=100			

A cross tabulation of size of organization with whether the organization knew the managers' training needs indicated that the organizations employing 500-999 employees chose "somewhat" (61.5 percent) more than any other size organization. Not a single respondent in that size organization reported they did not know their managers' training needs. The other organizations were more evenly distributed between "somewhat" and "yes" when asked if they knew their managers' training needs. (See Table XXI.)

TABLE XXI
KNOWLEDGE OF MANAGERS' TRAINING NEEDS
BY SIZE OF ORGANIZATION

Size of Organization	No %	Somewhat %	Yes %
50-99	6.6	31.1	62.3
100-249	6.1	42.1	51.8
250-499	4.8	46.8	48.4
500-999	0.0	61.5	38.5
n=359			

A cross tabulation of type of organization with whether the organization knew their managers' training needs indicated that more than 50 percent of the organizations

felt they knew their managers' training needs. Transportation/communications/utilities indicated the strongest "yes." Retail trade indicated the fewest "no" responses. Manufacturing and wholesale trade had the most "no" responses. (See Table XXII.)

TABLE XXII
KNOWLEDGE OF MANAGERS' TRAINING NEEDS
BY TYPE OF ORGANIZATION

Type of Organization	No %	Somewhat %	Yes %
Manufacturing	8.3	39.1	52.6
Banking/Finance/Insurance	5.8	35.3	58.9
Transportation/Communications/ Utilities	3.8	26.9	69.3
Business Services	3.4	37.9	58.7
Retail Trade	2.6	47.4	50.0
Public Administration	5.3	31.6	63.1
Health Services	4.3	39.1	56.6
Mining/Construction/Agriculture	5.9	58.8	35.8
Wholesale Trade	7.7	38.5	53.8
Other	0.0	50.0	50.0

Question 13 asked, Has a needs assessment been performed in your company within the past three years to determine managers' training needs? The 364 respondents answered as follows: Yes=28.3 percent No=63.7 percent Don't know=8 percent.

A cross tabulation of size of organization with whether they had performed a needs assessment indicated the organizations employing 500-999 were evenly divided between those who had and those who had not. Those with fewer than 250 employees most strongly indicated that they did not perform needs assessments. (See Table XXIII.)

TABLE XXIII
ORGANIZATIONS THAT PERFORM NEEDS ASSESSMENTS
BY SIZE OF ORGANIZATION

Size of Organization	Yes %	No %	Don't Know %
50-99	26.0	66.2	7.8
100-249	25.9	66.0	8.1
250-499	35.5	56.4	8.1
500-999	46.2	46.1	7.7
n=364			

A cross tabulation of type of organization with whether they had performed a needs assessment in the past three years indicated more than 50 percent had not. Retail trade most frequently indicated they had performed a needs assessment. No wholesale trade respondents indicated they had performed a needs assessment. Transportation/communications/utilities had the next fewest number of

respondents indicating they had performed a needs assessment. (Table XXIV)

TABLE XXIV
ORGANIZATIONS THAT PERFORM NEEDS ASSESSMENTS
BY TYPE OF ORGANIZATION

Type of Organization	Yes %	No %	Don't Know %
Manufacturing	29.6	62.3	8.1
Banking/Finance/Insurance	35.3	58.8	5.9
Transportation/Communications/ Utilities	14.8	74.1	11.1
Business Services	31.0	62.1	6.9
Retail Trade	39.5	50.0	10.5
Public Administration	25.6	66.7	7.7
Health Services	34.8	60.9	4.3
Mining/Construction/Ag	17.6	70.6	11.8
Wholesale Trade	00.0	92.9	7.1
Other	25.0	75.0	00.0

Question 14 asked, Which criteria are used to determine manager training needs? The respondents ranked the criteria as follows: need for performance improvement, manager requests, new technology required, and new hire required. Table XXV shows the percentage of each criteria as indicated by the respondents.

TABLE XXV
CRITERIA DETERMINING MANAGER TRAINING NEEDS

	Frequency	Percent of Total	Percent of Respondents
Performance improvement			
Frequently	122	32.1	36.9
Some	190	50.0	57.4
Not at all	19	5.0	5.7
No response	49	12.9	00.0
Manager requests			
Frequently	112	29.5	35.2
Some	189	49.7	59.5
Not at all	17	4.5	5.3
No response	62	16.3	00.0
New technology required			
Frequently	110	28.9	34.7
Some	166	43.7	52.4
Not at all	41	10.8	12.9
No response	63	16.6	00.0
New hire required			
Frequently	93	24.5	31.3
Some	149	39.2	50.2
Not at all	55	14.5	18.5
No response	83	21.8	00.0

n=380 percent=100

Question 15 asked, Who determines which managers receive training? The respondents' answer in rank order follows:

1. Chief Executive Officer 66.3%
2. Immediate supervisors 47.9%
3. Manager himself/herself 43.9%
4. Personnel department 30.0%

Question 21 asked, Does your company evaluate manager training? Formal evaluation? Informal evaluation?

Those responding indicated yes (60.2 percent) more than no (39.8 percent). The evaluation, according to those who answered yes, was more informal (71.2 percent) than formal (28.8 percent).

A cross tabulation of size of organizations with whether they evaluated manager training indicated a significant increase in those that did when the organizations employed 250 or more. Organizations with fewer than 250 employees were about evenly divided between those who did and did not evaluate manager training. (See Table XXVI.)

TABLE XXVI
ORGANIZATIONS THAT EVALUATE MANAGEMENT TRAINING
BY SIZE OF ORGANIZATION

Size of Organization	Yes %	No %
50-99	57.1	42.9
100-249	55.6	44.4
250-499	70.5	29.5
500-999	92.9	7.1
n=362		

A cross tabulation of type of organizations with whether they evaluated manager training indicated little difference in responses by types of organization. More

health services and retail trade respondents indicated they evaluated training. (See Table XXVII.)

TABLE XXVII
ORGANIZATIONS THAT EVALUATE MANAGEMENT TRAINING
BY TYPE OF ORGANIZATION

Type of Organization	Yes %	No %
Manufacturing	57.0	43.0
Banking/Finance/Insurance	58.3	41.7
Transportation/Communications/Utilities	61.5	38.5
Business Services	58.6	41.4
Retail Trade	71.8	28.2
Public Administration	53.8	46.2
Health Services	77.3	22.7
Mining/Construction/Agriculture	46.7	53.3
Wholesale Trade	61.5	38.5
Other	75.0	25.0

Research Question 7

What training preferences do these organizations have in regard to the type, sources, and methods of management training? Questions 19 and 20 on the questionnaire were designed to answer this question.

Question 19 asked, Which of the following training would you like to offer or continue to offer your managers? Respondents chose from a list of 21 program areas categorized according to the following types: management/

leadership, marketing, company-specific, personal development, and systems training.

The following list ranks the respondents' choices in order of preference:

1. 69.7% Planning/decision making (Management/Leadership)
2. 66.8% Time management (Management/Leadership)
3. 65.5% Employee relations (Personal)
4. 64.7% Motivation (Personal)
5. 62.6% Setting priorities (Management/Leadership)
6. 57.9% Computer (Systems)
7. 57.6% Performance appraisal (Management/Leadership)
8. 49.2% Customer relations (Personal)
9. 45.3% Interpersonal communication (Personal)
10. 42.1% Written communication (Personal)
11. 43.7% Company policies/practices (Company-Specific)
12. 38.9% Sales (Marketing)
13. 36.8% Financial/Budgeting (Management/Leadership)
14. 34.9% Product/Service quality (Marketing)
15. 34.2% Legal regulations (Management/Leadership)
16. 29.2% Inventory (Systems)
17. 28.9% Staffing (Management/Leadership)
18. 26.6% Conducting meetings (Personal)
19. 26.6% Record keeping (Systems)
20. 20.3% Accounting (Systems)
21. 18.7% Product development (Marketing)

Question 20 asked the respondents to rank sources and methods of training they would choose to satisfy managers' training needs. The types of training were the categories listed in the question above. Respondents ranked their first preference as number one. Self-paced or self-instruction (books), computer-assisted, packaged (video/audio assisted), and classroom (lecture/discussion/activity) were the method choices given the respondents.

The method they named as first choice for all types of training was classroom (lecture/discussion/activity). The second choice of method, for all types of training

except systems, was packaged (video/audio assisted). The third choice was self-paced or self-instruction (books). Computer-assisted ranked last, except for systems training. It ranked second for systems training. (See Table XXVIII.)

TABLE XXVIII
METHOD OF TRAINING
MEAN OF RESPONSES

Type of Training	Self-paced (books)	Computer- assisted	Packaged	Class- room
Management/ Leadership	2.98	3.30	2.13	1.54
Marketing	2.90	3.19	1.95	1.77
Company- Specific	2.79	3.25	2.22	1.74
Personal	2.68	3.30	2.12	1.76
Systems	2.98	2.31	2.33	2.19
Scale 1-5	1 = First Preference			

The source of training choices given respondents were area vocational-technical schools, university/colleges, their own company (in-house), or private consulting/training firms. Respondents ranked their first preference as number one. The source of training the respondents named as first choice for management/leadership training was

private consulting/training firms. (See Table XXIX.) The first choice for marketing training was "other," with professional organizations, trade associations, and suppliers most frequently mentioned. The first choice for company-specific, personal, and systems training was their company, in-house.

Second choice for source of training for marketing, company-specific, and personal training was private consulting/training firms. For management/leadership training, respondents chose their own company (or in-house) second as the source of training. Universities and colleges were chosen second as a source for systems training. Area vocational-technical schools consistently were chosen fourth or fifth as a source of training.

TABLE XXIX

SOURCE OF TRAINING
MEAN OF RESPONSES

Type of Training	Area Vo- Tech	University/ College	In- House	Private Firms
Management	3.13	2.45	2.29	2.20
Marketing	3.16	2.59	2.26	2.19
Company-specific	3.12	2.99	1.51	2.57
Personal	3.04	2.48	2.23	2.36
Systems	2.74	2.39	2.39	2.52

Scale 1-5 1 = First Preference

Summary

Responses to the 16 questionnaire questions designed to answer the seven research questions were tabulated from the 380 respondents that fit the 50-1000 employee population. Cross tabulation of the size and type of organizations with various questions indicated the effect that size and type of organization have on management training.

The size of the organization affects management training. The data indicated that when organizations reached 500 employees they tended to have a person in charge of management training. If the organization had a person in charge of management training, those with 250 or more employees more frequently indicated management training was that person's primary responsibility.

Organizations with 250 or more employees more frequently indicated they budgeted for the training and more indicated they spent over \$20,000 the past year. The size of the organization, however, did not seem to affect significantly the number of managers trained. All sizes were evenly divided between whether they trained more or less than 50 percent of their managers the past year.

The organizations with 250 or more employees were the least satisfied with their management training. They indicated they knew at least "somewhat" the training needs. Organizations with 500 or more employees most frequently indicated the "somewhat." None indicated a "no" when asked

if they knew their managers' training needs, yet they indicated least strongly they knew their managers' training needs. Organizations with 250 or more employees most frequently indicated that they performed needs assessments. A significantly stronger response that management training was evaluated was also indicated in that size organization.

The survey results can be generalized to the population except for the mining/construction/agriculture group. Manufacturing was evenly divided between those who did and did not have someone responsible for management training. Training was not that person's primary responsibility, however. They were evenly divided between those who budgeted the past year for training and those who trained more than 50 percent of their managers. They spent less than \$5,000. They somewhat knew their managers' training needs, did not perform needs assessments, but did evaluate training. They indicated they felt their managers' training was fairly adequate.

Banking/financial/insurance frequently indicated they did have someone with management training responsibility; however, it was not that person's primary responsibility. They were evenly divided between those who did and did not budget for training. They frequently indicated they spent more than \$10,000 for the training the past year, although they were evenly divided between those who trained more or less than 50 percent of their managers. They somewhat

knew managers' training needs, did not perform needs assessments, but did evaluate training. They indicated they felt their managers' training was fairly adequate.

Transportation/communication/utilities were evenly divided between those who did and did not have anyone with management training responsibility. Training is not that person's primary responsibility, however. They indicated they budgeted for training and spent more than \$10,000 for the training the past year. They were evenly divided between those who trained more or less than 50 percent of their managers. They felt they knew their managers' training needs, but they did not perform needs assessments. They did evaluate training and felt the managers' training was fairly adequate.

Business services were about evenly divided between those who did and did not have someone responsible for management training. Training was not that person's primary responsibility. They most frequently indicated they did not budget for management training, and they spent less than \$5,000 the past year on the training. They indicated, however, that they trained more than 50 percent of their managers the past year. They indicated they somewhat knew their managers' training needs, did not perform needs assessments, but did evaluate training. They felt their managers' training was fairly adequate.

Retail trade did have someone in charge of management

training, but management training was not that person's primary responsibility. They did budget for the training, but the past year spent less than \$5,000. They were about evenly divided between those who trained more or less than 50 percent of their managers the past year. They somewhat knew the managers' training needs, did perform needs assessments and evaluate training. They felt their managers' training was fairly adequate.

Public administration most frequently indicated they did not have someone with management training responsibility, and management training, for those who did, was not that person's primary responsibility. They were about evenly divided between those who did and did not budget for the training, and the past year they spent less than \$5,000 for the training. They indicated, however, that the past year they trained more than 50 percent of their managers. They also indicated they knew their managers' training needs, but they did not perform needs assessments. They evaluated management training and felt the training was fairly adequate.

Health services was about evenly divided between those who did and did not have someone with management training responsibility. For those who did, management training was not that person's primary responsibility. They indicated they did budget for management training, but they spent less than \$5,000 the past year. They were about evenly

divided between those who trained more or less than 50 percent of their managers the past year. They indicated they somewhat knew the managers' training needs, but they did not perform needs assessments. They evaluated management training and felt it was fairly adequate.

Wholesale trade was about evenly divided between those who did and did not have anyone with management training responsibility. If some did have a person with management training responsibility, the group significantly indicated the management training was not that person's primary responsibility. They did not budget for the training and significantly indicated they spent less than \$5,000 the past year for the training. They trained less than 50 percent of their managers the past year. They felt they somewhat knew the managers' training needs, but did not perform needs assessments or evaluate the training. They significantly indicated that management training was inadequate.

The "other" category consisted of organizations that did not indicate a Standard Industrial Code category and could not be categorized by type of organization. These organizations significantly indicated they had someone responsible for management training, but the training was not that person's primary responsibility. They did budget for training, but spent less than \$5,000 the past year for management training. They trained more than 50 percent of

their managers the past year. They felt they at least somewhat knew the managers' training needs, but did not perform needs assessments. They did evaluate training and felt the the training was fairly adequate.

The original purpose of this study was to examine management training activities in Oklahoma mid-sized organizations in order to provide adequate information to those making management training decisions. This chapter gave the results of the survey of the sample population.

The data analyzed generally reflected that the mid-sized organization is training managers, but management training is not a strong priority. Chapter V gives the conclusions and recommendations resulting from the analyzed data.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

The generic question that precipitated this study was, What management training activities are taking place in Oklahoma mid-sized organizations? Indications were that the larger organizations were the ones that did the most management training; the smaller organizations had a need for management training that was not being met. The review of literature indicated that small and mid-sized organizations have special needs in management training that until recently have not been addressed by either the educational or professional training and development sectors. The literature review also indicated that the organizations without a part-time or full-time training specialist are the ones with the greatest need.

The purpose of the study was to examine management training activities in Oklahoma with 50-1000 employees in order to provide more adequate information to those making management training decisions. The study was designed to provide organizations information to identify strengths and weaknesses in management training in similar organizations. It was also designed to give a better understanding of how

those offering management training might best assist mid-sized organizations in their management training efforts.

The following seven research questions were designed to answer the generic question:

1. Do the organizations in the defined population have a training and development specialist?
2. Do they train their managers?
3. If so, how much training do they do?
4. How is that training delivered?
5. If they don't train, why not?
6. Do the organizations attempt to determine their managers' training needs?
7. What training preferences do these organizations have in regard to the type, sources, and methods of management training?

The economic climate in Oklahoma at the time of the survey was in a sharp downturn. According to the literature, economic slumps normally mean training is reduced. Despite the slump, 503 organizations responded to the questionnaire. After a follow-up of non-respondents and applying a test of proportions to the respondents and nonrespondents, the 503 responses to 1428 questionnaires delivered to those in the 50-1000 population were considered adequate. The follow-up of nonrespondents indicated no significant difference between them and the respondents. The results of the study profiled management training in Oklahoma so that generalizations could be made to the types of organizations surveyed except for the mining/construction/agriculture group.

The study was designed to provide information to two groups: organizations wanting to provide management training to their employees and those wanting to assist those organizations in their management training. The study will enable those providing training for their managers to decide which management training programs to choose, how much to spend on the training, and what training methods are best suited to their needs. They can also judge how they compare to other organizations of their size and type in their management training efforts. Those offering the training can use the information in the study to determine the types of management development programs to offer, methods to use in the training, and the types of organizations needing the training.

Conclusions

Management training in Oklahoma is not a priority in organizations with 50-1000 employees. The number of managers trained the past year, the number of organizations budgeting for the training, the dollars spent, and the number employing someone whose primary responsibility is management training indicated the lack of emphasis on management training. Deterrents cited were time, cost and location of training.

These organizations did not emphasize management training, yet they felt it was only "fairly adequate."

The lack of training specialists within the organizations to plan, develop, and deliver the training could be a direct link to their lack of satisfaction in the training. Respondents indicated that most of their managers were trained in-house, on-site, but they preferred private consulting/training firms as the source for the training programs they wanted to continue to offer or offer in the future.

The size of the organization has the biggest effect on the amount of training offered managers. When organizations reached 250 employees, the data indicated they began to employ someone with management training responsibility. Half of the managers in half of the organizations in the past year were trained. The larger the organization, the more likely it was for a manager to receive training.

Some types of businesses and industries did spend more for and placed a greater emphasis on management training. Banking/financial/insurance and transportation/communication/utilities spent more than the other groups the past year on training. Business services and public administration trained more of their managers the past year. Transportation/communication/utilities most frequently indicated they budgeted for management training. Wholesale trade emphasized management training least (indicated by the amount spent and the number of managers trained the past year).

The organizations are attempting to gain as much training as possible for the dollars spent, which is not surprising in the economic climate at the time of the survey. If the average organization had 12 managers (survey mean) and the average organization spent less than \$5,000 (survey results) on training the past year, each organization spent \$416 per manager. If the average manager received 20 hours of training (survey mean), that means the training cost per manager per hour was \$21. According to leading publications, in terms of training in 1985, that is economical.

Time, location, and cost most frequently interfered with management training. This is congruent with two of the factors cited in the literature review as affecting the amount of management training in smaller organizations. The third factor cited in the literature review (the "practicality" effect) was not clearly supported by the study. The study does not indicate that these organizations prefer immediately usable skills or "hard" skills training rather than conceptual skills or "soft" skills training. The respondents chose seven "soft" skills programs (planning/decision making, time management, employee relations, motivation, setting priorities, customer relations, and interpersonal communication) and three "hard" skill programs (computers, performance appraisals, and written communication) in the top ten program preferences.

The majority of the organizations have no identifiable process for determining training needs or evaluating the impact of the management training they do. Management training decisions are subjective rather than objective. While most of the respondents indicated they knew, at least somewhat, their managers' training needs, a larger majority have not conducted a needs assessment in the past three years. When asked who determines which managers receive training, the most frequent answer was the chief executive officer. The majority indicated they evaluate management training, but a larger majority said it was an informal evaluation.

This study gives a clear enough picture of management training activities in the mid-sized organization in Oklahoma that an organization of that size can see where it fits compared to others of its size and type. It also is apparent that management training is perceived as needed, although the need does not appear to be a high priority. The noticeable areas of management training need are in leadership and personal development skills, and their preferences for the source and methods to deliver that type of training are private consulting/training firms delivering the training in the classroom setting.

Recommendations

To adequately meet the mid-sized organizations' management training needs, the first step would be to identify the training needs. The organization needs to conduct a comprehensive needs assessment and to evaluate previous management training. This step would provide a direction for the organization and give a starting point for making management training decisions.

Both those who offer management training and those who request it should take note of the differences in delivering training to big versus mid-sized or smaller organizations. They should also note the orientation of the smaller organizations toward practical problem-solving approaches to training. Further study of these differences would enable those offering the training to better assist these organizations in their training efforts. It would also enable those receiving the training to judge whether the training sources offer management training that would address their specific needs.

Further study of the wholesale group would clarify their lack of emphasis on management training in order to more effectively meet their training needs. Few of them indicated they budgeted for management training; they spent little the past year for the training. Most indicated they trained less than 50 percent of their managers the past year. Those organizations' management effectiveness could

profit from determining the reasons for their lack of emphasis on management training.

Another area for further study is the disparity between the number of managers trained by business services and the amount they spend on training. How effective is the management training they receive? The amount they spent (62.1 percent spent less than \$5,000 the past year) and the number who did not budget for training (62.1 percent) indicated small expenditures for training. However, 64.3 percent said they trained more than 50 percent of their managers the past year.

An additional area for further study is the disparity between the number of managers banking/finance/insurance and transportation/communications/utilities trained and the amount they spent on training. How effective is the management training they receive? Both indicated (more than 50 percent) they trained less than 50 percent of their managers, but both ranked high in the amount they spent (more than 20 percent spent more than \$10,000).

Another recommended area of study is the training program preferences of these organizations. Both those receiving management training and those offering the training should note that the "soft" skill programs are areas of management training need in the mid-sized organization. Appropriate programs need to be offered to these organizations.

This chapter has presented a summary of the study, conclusions, and recommendations for further study. The study is the first time the mid-sized organization's management training in Oklahoma has been examined. The amount of interest it has generated is an indication that a great deal more effort to examine training efforts and determine training needs is desired in the business community. The organizations acknowledged a need for more effective management development. The mid-sized organization offers those who deliver management training an opportunity to develop quality professional services to satisfy a critical need.

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APPENDIX A

LIST OF CONTRIBUTORS

LIST OF CONTRIBUTORS

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Others Contributing

Barbara Clements, State Department of Economic Development, Contributed to the survey list

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Marian Martin, Oklahoma Employment Security Commission, Contributed to the survey list

Ellis McHendry and print shop staff, State Department of Vo-Tech, Assistance in the mass mailings

Mick Smith, Business/Industrial Training Services, State Vo-Tech, Coordinated the cooperative effort with State Vo-Tech

Systems Design Staff, State Department of Vo-Tech, Data entry and programming assistance

Rudy Szewczak, Muskogee Chamber of Commerce, Follow up of Muskogee organizations in sample

Kristi Treadwell, Business/Industrial Training Services, State Vo-Tech, Assistance in telephoning Chambers of Commerce

APPENDIX B

QUESTIONNAIRE AND COVER LETTERS

MANAGERS' TRAINING SURVEY

Questionnaire Instructions:

1. The Chief Executive Officer or person in charge of management training should complete the questionnaire.
2. Using the definitions below, please answer all questions.
3. Please complete as soon as possible and return in the enclosed postage-paid envelope to Mary Jo Elenburg, 8224 Northwest 99, Oklahoma City, OK 73132.

Definition of Managers

Those who are in charge of a function(s), operation(s), or program(s), regardless of whether they have anyone reporting to them or not. **THIS WOULD INCLUDE SUPERVISORS.**

Definition of Management Training

Any formal training (workshops, seminars, programs, etc., sponsored by the company) that managers receive **EXCEPT ONE-ON-ONE OR ON-THE-JOB TRAINING.**

QUESTIONNAIRE

IDENTIFYING YOU

1. Type of business or industry
 1. Manufacturing
 2. Banking/Finance/Insurance
 3. Transportation/Communications/Utilities
 4. Business Services
 5. Retail Trade (1,2)
 6. Public Administration
 7. Health Services
 8. Mining/Construction/Agriculture
 9. Wholesale Trade
 10. Other (Please specify) _____
2. Total number of employees: (3)

1. <input type="checkbox"/> fewer than 50	4. <input type="checkbox"/> 250 - 499
2. <input type="checkbox"/> 50 - 99	5. <input type="checkbox"/> 500 - 999
3. <input type="checkbox"/> 100 - 249	6. <input type="checkbox"/> 1,000 or more
3. Is your organization (4)
 1. A subsidiary
 2. A branch or divisional operation
 3. Independent (no ownership affiliation with other companies)
4. How many of your employees meet the manager definition? # (5,6,7) _____

DELIVERING YOUR TRAINING (Training of Managers/Supervisors)

5. Does your company budget funds for management training?
 1. Yes (8)
 2. No
6. a. Do you have a staff member who administers or coordinates management training?
 1. Yes
 2. No (9)
 3. Person's title _____ (10,11)
- b. Is training his/her primary responsibility? (12)
 1. Yes
 2. No
 3. (S)He reports to _____ (13,14)
(person's title)
7. How are your managers being trained? (Check all that apply.)
 1. In-house, company developed and presented training programs (15)
 2. In-house, private firm developed and presented training programs (16)
 3. Off-site, company developed and presented training programs (17)
 4. Off-site, private firm developed and presented training programs (18)
 5. Training delivered by a college/university (19)
 6. Training delivered by a vocational/technical school (20)
 7. Other (please specify) _____ (21)

AMOUNT OF TRAINING YOUR COMPANY DOES (Training of Managers/Supervisors)

8. What percent of your **managers** received training this past year? _____% (22,23,24)
9. How much did you spend training **managers** this past year? (INCLUDE consultant, workshop, film, supply, travel, etc. costs; EXCLUDE training staff or participant salaries and hardware costs.)
 1. less than \$2,000 4. \$10,000 - \$19,999
 2. \$2,000 - \$4,999 5. more than \$20,000
 3. \$5,000 - \$9,999 (25)
10. How many **total** hours did your **managers** spend in training this past year? _____ hours (26,27,28)
11. Do you feel your **managers** receive adequate training?
 1. Inadequate
 2. Fairly Adequate
 3. Very Adequate (29)

DETERMINING YOUR TRAINING NEEDS (Manager/Supervisor Training Needs)

12. Do you know what your **managers'** training needs are? (Circle the number that best describes.)
 Yes Somewhat No (30)
 5 4 3 2 1
13. Has a needs assessment been performed in your company within the past three years to determine **managers'** training needs?
 1. Yes 3. Don't know
 2. No (31)

14. Which criteria are used to determine **manager** training needs? Place a check (✓) in the appropriate space.

Criteria Used	Frequently (1)	Some (2)	Not at all (3)	
1. Need for performance improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(32)
2. Manager requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(33)
3. New technology requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(34)
4. New hire required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(35)
5. Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(36,37)

15. Who determines which **managers** receive training? Check all that apply.

1. Chief Executive Officer (38)
 2. Personnel Department (39)
 3. Immediate supervisors (40)
 4. Manager himself/herself (41)
 5. Other (please specify) _____ (42,43)

16. What interferes with your **managers** receiving training? Place a check in the appropriate space.

	Frequently (1)	Some (2)	Not at all (3)	
1. Time it takes to train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(44)
2. Cost of training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(45)
3. Location of training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(46)
4. Unavailability of training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(47)
5. No time to plan training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(48)
6. No staff to offer training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(49)
7. Manager unwillingness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(50)
8. No one to coordinate training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(51)
9. Other (please specify) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(52,53)

17. Do you anticipate any new technology or changes in your business that would affect your **managers'** training needs in the next three to five years? 1. Yes 2. No (54)

18. If yes, please specify what you think these changes will be. Specifically, in what new technologies will your **managers** need training? (55,56,57)

YOUR TRAINING PREFERENCES FOR MANAGERS/SUPERVISORS

19. Which of the following training would you like to offer or continue to offer your managers? Check all that apply.

- | | | | |
|---|------|--|------|
| Management/Leadership: | | Personal: | |
| <input type="checkbox"/> Setting priorities | (58) | <input type="checkbox"/> Customer relations | (70) |
| <input type="checkbox"/> Planning/Decision-making | (59) | <input type="checkbox"/> Employee relations | (71) |
| <input type="checkbox"/> Delegating | (60) | <input type="checkbox"/> Interpersonal communication | (72) |
| <input type="checkbox"/> Time management | (61) | <input type="checkbox"/> Written communication | (73) |
| <input type="checkbox"/> Financial/Budgeting | (62) | <input type="checkbox"/> Conducting meetings | (74) |
| <input type="checkbox"/> Staffing | (63) | <input type="checkbox"/> Motivation | (75) |
| <input type="checkbox"/> Performance appraisal | (64) | | |
| <input type="checkbox"/> Legal regulations | (65) | | |
| Marketing: | | Systems Training: | |
| <input type="checkbox"/> Product/Service quality | (66) | <input type="checkbox"/> Computer | (76) |
| <input type="checkbox"/> Product development | (67) | <input type="checkbox"/> Accounting | (77) |
| <input type="checkbox"/> Sales | (68) | <input type="checkbox"/> Inventory | (78) |
| | | <input type="checkbox"/> Record keeping | (79) |
| Company-Specific: | | Other: (specify) | |
| <input type="checkbox"/> Policies/Practices | (69) | <input type="checkbox"/> _____ | (80) |
| | | <input type="checkbox"/> _____ | (81) |

20. Rank the following methods and sources you would choose to satisfy managers' training needs. Indicate your preferences by ranking the first preference #1. (Refer to question 19 for examples of training types listed below.)

Type of Training	Method of Training (Part A, question 20)			
	(Rank 1-4 in each row for each type of training. Please place a number in each blank.)			
	Self-paced or self-instruction (books)	Computer- Assisted	Packaged (Video-audio assisted)	Classroom (Lecture/discussion/ activity)
Management/ Leadership	_____ (82)	_____ (83)	_____ (84)	_____ (85)
Marketing	_____ (86)	_____ (87)	_____ (88)	_____ (89)
Company- Specific	_____ (90)	_____ (91)	_____ (92)	_____ (93)
Personal	_____ (94)	_____ (95)	_____ (96)	_____ (97)
Systems	_____ (98)	_____ (99)	_____ (100)	_____ (101)

Type of Training	Source of Training (Part B, question 20)				
	(Rank 1-5 in each row for each type of training. Please place a number in each blank.)				
	Area Vo-Tech School	University/ College	Your Company (In-House)	Private Consulting/ Training Firm	Other: (Specify)
Management/ Leadership	_____ (102)	_____ (103)	_____ (104)	_____ (105)	_____ (106)
Marketing	_____ (107)	_____ (108)	_____ (109)	_____ (110)	_____ (111)
Company- Specific	_____ (112)	_____ (113)	_____ (114)	_____ (115)	_____ (116)
Personal	_____ (117)	_____ (118)	_____ (119)	_____ (120)	_____ (121)
Systems	_____ (122)	_____ (123)	_____ (124)	_____ (125)	_____ (126)

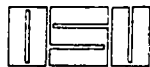
EVALUATING YOUR TRAINING OF MANAGERS/SUPERVISORS

21. a. Does your company evaluate manager training? b. If yes, is the evaluation:
 1. Yes (127) 1. Formal (128)
 2. No 2. Informal

22. Has your company offered or does it presently offer the listed training for your managers? What benefit do you feel your company received from the training? Respond by checking the appropriate spaces.

Type Training	When Offered				Type Benefit Received			
	Present	Past	Never		Tangible	Intangible	None	
Management/Leadership								
Setting priorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(129)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(130)
Planning/Decision-making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(131)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(132)
Delegating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(133)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(134)
Time management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(135)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(136)
Financial/Budgeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(137)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(138)
Staffing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(139)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(140)
Performance appraisal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(141)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(142)
Legal regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(143)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(144)
Marketing								
Product/Service quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(145)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(146)
Product development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(147)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(148)
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(149)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(150)
Company-Specific								
Policies/Practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(151)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(152)
Personal								
Customer relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(153)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(154)
Employee relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(155)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(156)
Interpersonal communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(157)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(158)
Written communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(159)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(160)
Conducting meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(161)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(162)
Motivation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(163)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(164)
Systems Training								
Computer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(165)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(166)
Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(167)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(168)
Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(169)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(170)
Record keeping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(171)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(172)
Other (specify)								
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(173)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(174)
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(175)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(176)

23. (Optional)
1. _____ (177-211)
 Name
2. _____ (212-236)
 Title
3. _____ (237-246)
 Telephone Number
4. Please send me a copy of the results of the study. (247)



Oklahoma State University

December 6, 1985

H. J. Woolslayer
 President
 Lear Siegler Inc
 Tinker Afb
 Oklahoma City, OK 73145

Dear H. J. Woolslayer:

If your managers could receive cost-effective training designed specifically for your needs, wouldn't you and your organization benefit? Better trained managers do increase organizational productivity.

No one has ever asked Oklahoma businesses and industries with 50-1000 employees what their training preferences are for their managers. If this information were readily available so you could find cost-effective sources for management training, couldn't you use it as a tool to improve the quality of your managers?

I am conducting a survey of training preferences for my doctoral dissertation at Oklahoma State University. The purpose of this research is to profile the training currently taking place and to assess training preferences in mid-sized organizations (50-1000 employees). Would you assist me in this project and, in turn, provide yourself with information that will help you in your training efforts?

In addition to the dissertation presentation, the results of the study will be used by the State Department of Vocational and Technical Education, who funded the research, and the Oklahoma Department of Economic Development to assist organizations like yours in their training efforts. You may also receive a summary report of the research results, if you desire.

Please complete the enclosed questionnaire (it will take only 10-15 minutes) and return it in the pre-addressed stamped envelope by 12/19/85. Neither participants nor their organizations will be identified in the data presentation. Your contribution is important. Won't you use the complimentary pencil first to fill out the questionnaire?

Sincerely,

Mary Jo Elenburg, Doctoral Candidate
 School of Occupational and
 Adult Education
 College of Education
 Oklahoma State University

H. Gene Smith, Dissertation Adviser
 Associate Professor
 School of Occupational and
 Adult Education
 College of Education
 Oklahoma State University

hwc

Enclosure



Oklahoma State University

January 15, 1986

Jerry Stefaniak
 Manager
 Ramada Inn
 Box 35768
 Tulsa, OK 74135

Dear Jerry Stefaniak:

Shortly before Christmas I mailed a Management Training Survey questionnaire to 1500 businesses and industries in Oklahoma. Your organization was on my mailing list. The rush of the season affected the number of questionnaires returned, so I am making a second request.

The data collected from the survey will be useful to those who desire to plan management training. The State Department of Vocational-Technical Education, who funded the survey, plans to use the data to assist organizations like yours in their management training efforts. No organizations or individuals will be identified in the data presentation.

In order for the data to be useful, I need a 40 percent return of the questionnaires. It takes only 10-15 minutes to complete the questionnaire. Even if you do not fit into the 50-1000 employee range identified in the first letter, would you please indicate that on question #2 and return the questionnaire in the pre-addressed, postage-paid envelope enclosed so I can account for all of those mailed?

By cooperating in the survey you will contribute to an effort to identify training preferences in the business community, an important contribution to productivity. You will also assist me in completing the study for my doctoral dissertation. Won't you please take a few minutes of your time in this new year to make those contributions? I would be very grateful.

Sincerely,

Mary Jo Elenburg, Doctoral Candidate
 School of Occupational and
 Adult Education
 College of Education
 Oklahoma State University

H. Gene Smith, Dissertation Adviser
 Associate Professor
 School of Occupational and
 Adult Education
 College of Education
 Oklahoma State University

hwc

Enclosure

APPENDIX C
STANDARD INDUSTRIAL CODES
USED IN THE STUDY

STANDARD INDUSTRIAL CODES

USED IN THE STUDY

Manufacturing

Food products; textile mill products; apparel and other finished products; lumber and wood products; furniture and fixtures; paper and allied products; chemicals and allied products; rubber and miscellaneous plastics products; leather and leather products; stone, clay, glass and concrete products; metal products; machinery; electrical and electronic machinery; transportation equipment; measuring, analyzing, and controlling instruments

Finance, Insurance, and Real Estate

Banking, credit agencies other than banks, security and commodity brokers and services, insurance, real estate, law offices, holding and other investment offices

Transportation, Communications, Utilities

Electric, gas, sanitary services, railroad, air, local, suburban, motorfreight and warehousing, water transportation, telephone, telegraph, radio, television

Business Services

Services: automotive repair, services, garages; entertainment, personnel, advertising, accounting, book-keeping, architectural, personal

Retail Trade

General merchandise, food, building, automotive dealers, apparel and accessories, furniture, eating and drinking places, pharmacies, liquor

Public Administration

City, county, administration of public service (non-profit) programs

Health Services

Hospitals, clinics, dental

Mining, Construction, Agriculture

Metal, coal, oil and gas, building contractors, forestry, fishing, crops, livestock, agricultural services

APPENDIX D

TEST OF PROPORTIONS. MAIL RESPONDENTS
AND TELEPHONE NON-RESPONDENTS

TEST OF PROPORTIONS
MAIL RESPONDENTS AND TELEPHONE NONRESPONDENTS

Formula:

$$z = \frac{P_1 - P_2}{\sqrt{\frac{f_1 + f_2}{n_1 + n_2} \left(\frac{1 - f_1 + f_2}{n_1 + n_2} \right) \left(\frac{1}{n_1} + \frac{1}{n_2} \right)}}$$

$$\alpha = .01 \quad z = +/- 2.57$$

P_1 = Proportion of n in mail respondents

P_2 = Proportion of n in telephone nonrespondents

n_1 = Mail returns = 380

n_2 = Telephone nonrespondents = 48

f_1 = frequency of mail return responses to question

f_2 = frequency of telephone nonrespondents responses to question

RESULTS

Questions	f_1 / P_1 n=380	f_2 / P_2 n=48	z

Question 1			
Manufacturing	139/.366	13/.271	1.29
Business Services	29/.076	5/.104	.68
Const./Mining/Ag.	18/.047	10/.208	4.25
Question 2	57/.150	10/.208	1.04
Question 5	213/.561	18/.375	2.44
Question 6A	184/.484	22/.458	.34
Question 11	208/.547	27/.563	-.21
Question 13	232/.611	34/.708	1.31

APPENDIX E

PUBLICITY LETTER AND NEWS RELEASES



December 20, 1985

TO: Chamber of Commerce Executives
FROM: Jack G. Springer, CCE, President

Recently organizations in your area received a Managers' Training Survey questionnaire. I would like you to urge them to complete it as soon as possible. You have already helped in that many of you, when called, provided the State Department of Vocational-Technical Education lists of businesses and industries with 50-1000 employees. A sample of those--1500 statewide--are the ones receiving the questionnaire.

This survey, which is being conducted for the State Department of Vocational-Technical Education by doctoral candidate Mary Jo Elenburg, will provide information valuable to organizations that wish to train managers, but need a cost-effective source. The State Department of Vo-Tech will use this information to provide management training that will address your organizations' needs and meet their preferences. The survey will profile training preferences.

This study is a step to enhance the economic development of existing businesses and industries. Better trained managers do increase organizational productivity.

A valid survey requires a high return rate of questionnaires, regardless of whether the organization is within the 50-1000 employee range. I realize that it will take 10-20 minutes time to complete it; however, such studies provide information that will be helpful to the business community.

No one in Oklahoma has conducted a survey like this before. We need you and your business community's support. Please make a point of publicizing the survey and requesting cooperation from those who receive the questionnaires. Anyone wanting more information about the survey or its results can contact Mary Jo Elenburg, 8224 Northwest 99 Street, Oklahoma City, Oklahoma 73132 (405-722-1371).

THE OKLAHOMA STATE CHAMBER OF COMMERCE
4020 N. LINCOLN BOULEVARD • OKLAHOMA CITY, OKLA. 73105 • (405) 424-4003

FROM: Dale Cotton
Public Information Officer
State Department of Vocational and Technical Education
Stillwater, OK 74074 Phone (405) 377-2000

arrived 12-11-85
all dialies
Total: 35

VO-TECH CONDUCTING MANAGERS' SURVEY

A "Managers' Training Survey" is now being conducted state-wide for mid-size business and industry to obtain an information base which will help Area Vocational-Technical Schools determine future training activities.

The survey is being done by the Business and Industrial Training Services (BITS) division of the State Department of Vocational and Technical Education, Stillwater.

The four-page questionnaire is being distributed to some 1,500 businesses which employ between 50 and 1,000 employees. BITS personnel hope to determine what training is now offered to management personnel, what training is actually needed if it were available, what agencies should offer managerial training, and what locations would be most convenient for offering training.

The surveys are directed to managers of the businesses and will take some 20 minutes to complete.

BITS division coordinator, Milford Smith, said that the survey would also help determine how management perceives the services now being offered by vocational and technical education, and what management perceives as their future needs for management training. The survey will also allow vo-tech to provide each of its area vo-tech schools with the management needs within its school district.

-more-

pg. 2, cotton, survey

One of the major benefits, Smith thinks, is that each area vo-tech school district will not only have a picture of management training needs state-wide, but will also be able to develop programs for their local constituents.

Managers will be asked to project training needs for the next three to five years, Smith said.

Many employers in the state have expressed a need for managerial training, Smith said.

Information which could be gained from such a survey is not currently available he said, so that training programs currently offered may not have been meeting the total need.

Any business or industry wanting to be included in the survey which did not receive the questionnaire may contact the BITS division at the State Vo-Tech office in Stillwater.

Results of the survey will be available to those who are interested.

Vo-Tech Survey Sent to Managers

A "Managers' Training Survey" is now being conducted statewide for mid-size business and industry to obtain an information base which will help Area Vocational-Technical Schools determine future training activities.

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Information which could be gained from such a survey is not currently available, according to Smith, so that training programs currently offered may not have been meeting the total need.

Any business or industry wanting to be included in the survey which did not receive the questionnaire may contact the BITS division of the State Vo-Tech office in Stillwater.

Results of the survey will be available to those who are interested.

OKLAHOMA PRESS
CLIPPING BUREAU
Oklahoma City, Oklahoma

Business Journal
& Legal Record
Tulsa, Ok.
Circ. 968

OKLAHOMA PRESS
CLIPPING BUREAU
Oklahoma City, Oklahoma

Daily Citizen
Cushing, Ok.
Circ. 4,246

Tech Conducts Training Survey

A "Managers' Training Survey" is now being conducted statewide for mid-size business and industry to obtain an information base which will help area vocational-technical schools determine future training activities.

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One of the major benefits, Smith thinks, is that each area vo-tech school district will not only have a picture of management training needs statewide, but will also be able to develop programs for their local constituents.

Managers will be asked to project training needs for the next three to five years, Smith said.

Many employers in the state have expressed a need for managerial training, he added.

Information which could be gained from such a survey is not currently available, he continued, so that training programs currently offered may not have been meeting the total need.

Any business or industry wanting to be included in the survey which did not receive the questionnaire may contact the BITS division at the State Vo-Tech office in Stillwater.

Results of the survey will be available to those who are interested.

'Managers Training Survey' conducted by Vo-Tech for future business training

A "Managers Training Survey" is now being conducted state-wide for mid-size business and industry to obtain an information base which will help Area Vocational-Technical Schools determine future training activities.

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Any business or industry wanting to be included in the survey which did not receive the questionnaire may contact the BITS division at the State Vo-Tech office in Stillwater.

Results of the survey will be available to those who are interested.

OKLAHOMA PRESS
CLIPPING BUREAU
Oklahoma City, Oklahoma

Weatherford News
Weatherford, Ok.
Circ. 4,042

OKLAHOMA PRESS
CLIPPING BUREAU
Oklahoma City, Oklahoma

Review-Courier
Alva, Ok.
Circ. 2,036
DEC 17 1985

State vo-tech conducts survey

STILLWATER — A "Managers Training Survey" is now being conducted statewide for mid-size business and industry to obtain an information base which will help area vocational-technical schools determine future training activities.

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2
VITA

Mary Jo Elenburg

Candidate for the Degree of
Doctor of Education

Thesis: A SURVEY OF MANAGMENT TRAINING ACTIVITIES IN
MID-SIZED ORGANIZATIONS IN OKLAHOMA

Major Field: Occupational and Adult Education

Biographical:

Education: Graduated from Malakoff High School, Malakoff, Texas, 1960; attended Henderson County Junior College, 1959-1960; received Bachelor of Arts degree from Baylor University, August, 1962; attended Texas A&M University, 1963; received Master of Arts degree, The University of Texas, August, 1965; completed requirements for the Doctor of Education degree at Oklahoma State University, May, 1986.

Professional Experience: English teacher, San Marcos Baptist Academy, 1964-65; English consultant, Texas Education Agency, 1966-67; English instructor, Southwest Texas State University, 1969-70; English instructor, parttime, Northern Virginia Community College, 1972-76; Adjunct Assistant Professor, English, Oklahoma State University Technical Institute, 1977-1982; Consultant/Trainer/Owner, Professionally Write, 1981 to present.

Affiliations: American Society for Training and Development, American Association for Adult and Continuing Education, International Association of Business Communicators, National Council of Teachers of English, Phi Kappa Phi