

Phase I

hired

V.C.
W/Staff

Mc Ber

brief

brief

2/5, 2/17, 2/22, 3/1

Bob's loyal

3 - prep.

3/2, 3/4, 3/16, 3/25

8 - 4 hr sessions

staff mtg.

Freel/2 hrs

1 - loyal

2 - staff

3/31, 4/7, 4/8, 4/13

3 - Freel
Retreat

4/23, 4/27, 4/29, 4/29-30

plus 2 sessions with Freel
+ 2 days interviewing staff

Project Com.

4/13

II 5603.40 } INVOICES
I 1855.00 }

7,458.40 - TOTALS

Mc BER

DAVE BROWN 2/19

SAT / SUN / MON
FRI PM

969-4162

STEVE RHINES WITH WED + THUR
DATA COLLECTING

ENDLEST HOUSE EXPENSIVE

HOTEL PLACES ON WEEKENDS

FENWAY CAMBRIDGE

JANET BEERS / LINCOLN

INITIATIVE OBJECTIVES

1. COMMON POOL OF DATA

PLANNING, BEGIN TO GET STAFF
WORKING TOGETHER
TO IMPROVE FUTURE
OF MUSEUM

SR DEVELOP INTO EFFECTIVE PLANNING TEAM WORK / PROBLEM
LR. PLANNING PROB. SOLVING
REMOVE OBSTACLES TO
SOLVE GROUP DATA ON HOW WE'RE
DOING & HOW WE CAN

DAY TO DAY
OPERATION PROBLEMS
WHILE PLANNING
THEY BIND LOOK AT IDEAS

WHO WILL BE LEADER
→ NELSON KUNIGER
ONE OF OBJECTIVES

#

WHERE DECISIONS MADE
+ HOW

EMPHASIZE OBJECTIVES

MENTION BELEN ON
DESIGN/PLANNING
FACILITATION

PLANNING AGENDA + WHAT
EACH PERSON'S ROLE IS

1ST TASK REVIEW TENTATIVE
OBJECTIVES + PLANNING
OBJECTIVES

ROY MALOUF
STEVE RAINES/174

RETREAT

BOARD - LOW TOLERANCE FOR UNFOCUSED
"GROUPIE" ACTIVITIES

WOULD LIKE TO DEAL WITH
CLEARLY DEVELOPED DATA & ALTERNATIVES

LENGTH OF RETREAT CAN LEAD
TO IMPATIENCE & TURN OFF
IF NOT PRODUCTIVE

STAFF - ALL WANT TO GET GOING

MOST WOULD LIKE LONG RANGE
WORK - BUT SOME TROUBLED
ABOUT BEING SKYING WITH
SO MANY SHORT RANGE
PROBLEMS THAT DEMAND OUR
ATTENTION

~~THE~~ WORRIED ABOUT EFFECTIVE USE
OF BOARD

SOME CONCERNED ABOUT THOUSANDS
~~OF~~ CLOSENESS OF GROUP

I'M - CONCERNED ABOUT BOARD
BEING PROPERLY USED

LENGTH - FOCUS

BEING CAUGHT ON HIGH
EXPECTATIONS



BOARD - LOOKING FOR EFFICIENCY - FINANCIAL STABILITY - SEXY IDEA - ONLY MODEST AMOUNT OF WORK - EASY ACCESS TO CAPITAL

STAFF - PROTECTIVE OF SOME POSITIONS, PROBLEMS - NEED FORWARD THOUGHT - STRONG LEADERSHIP - DIRECT PARTICIPATION - RELIEF FROM MONEY PROBLEMS - RELEVANCE

FROM BOARD + STAFF

LUKE - CLEAR COMMITMENTS - ATTENTION TO MY CRITERIA - FREEDOM TO GET ON WITH ALL WORK

BOARD - SHOW US THE DOUBT & WE'LL GO ANYWHERE WITHIN REASON

STAFF - WE CAN'T DECIDE WHETHER WE WANT ^{SPONSORING THINGS} IN A OR A STRONG DIRECTIVE TO FOLLOW

LUKE - GIVE ME A RELEASE TO MOVE & I'LL LEAD YOU TOWARDS GREAT THINGS

WE NEED A REVIEW TO HEAR EACH OTHER OUT & DECIDE WHAT THE ROLE OF EACH OF US WILL BE FOR THE NEXT MONTHS

JOH - AMOUNT YOU GET OUT OF
IT DEPENDS ON WHAT
YOU PUT IN - LOTS
OF DATA PREPARED -
NOT

AGENDA - DECISION TRYING
TO REACH - FOCUSED
ATTENTION

GOT TO HAVE FOCUS -
DONT LIKE GROUP THERAPY
STUFF

KNOWING EXACTLY UP TO
DATE ON WHERE I AM
- ONE DAY

ARRIVE AT DECISION WEEK END

LOOKING FOR COUSANT OR
LEADERSHIP

WONT GET STIMULUS FOR
ANY LEADERSHIP -
MAY NOT HELP PLAN

SELWEN \$400/DAY

BURNHAM \$255/DAY

FISCAL

MALCOFF \$332/DAY

CORP. SERVICES

CHINESNITH 250/DAY

TRAINER

RETREAT CENTER COSTS

HOTEL \$200/DAY FOR LEADERS

2/22/71

MEMO

To: Members of Staff, Board & Corporation
From: Mike
Re: Planning Retreat

After talking with quite a few members of the staff, Board and Dave Berlew, we have come up with the following plan. The Museum will sponsor an intensive planning retreat for all regular staff and interested members of the Board and Corporation this coming weekend.

Our overall goal will be to get the staff working together to begin planning and implementing the Museum's future. Specifically we want to (1) gather data about each other's concerns and expectations; (2) analyze short and long-range planning, decision-making and implementation tasks, develop a schedule and assign responsibility for getting them done; (3) remove obstacles to effective team work and develop specific problem solving skills; and if there is time (4) make a start on the planning itself.

We can judge the retreat a success if each of us comes out of the weekend with a clear understanding of what the Museum must do in the next six months and what his and each other's responsibilities will be in accomplishing that work.

The retreat will run, depending on your wishes, from either Friday evening or Saturday morning through Monday afternoon. Leadership and planning will be provided by Dave Berlew and Steve Rhinesmith of McBer and by myself and Phyl for the Museum. The location (we need suggestions of places that can feed, house and meet 15 to 25 people within 10 to 75 miles of Boston) will be announced later. Cost of food, housing and consultants will be borne by the Museum. Participants will have to contribute transportation, drinks and their time. Although it's not encouraged, a limited number of non-participating spouses can be accommodated if you can't be separated from each other for the weekend. Your department head and Phyl will help arrange coverage for your job while you are away. We will be counting heavily on CWS, former employees and others who do not have long-term commitments to the Museum.

Memo (continued)

In order to gather preliminary data and to facilitate planning for the retreat, Steve Rhinesmith will be interviewing some members of the staff on Wednesday and Thursday.

Participants must commit themselves to the entire retreat. It's important that all staff come if they expect to be active in, or critics of, the planning process from this point on. The involvement of trustees and incorporators is less important at this stage, although we would certainly welcome their participation.

Please fill out the accompanying sheet and return it to Phyl's box by 12:00 on Tuesday.

(Name) _____

(Position & Department) _____

I will/

I (will/will not) be participating in the retreat.

I (will/will not) be bringing my husband or wife.

I prefer (Friday evening/Saturday morning) as our starting time.

I suggest you contact _____ (phone) _____

about possible facilities.

I would like to make some additional suggestions about the retreat:

I can be interviewed by Steve Rhinesmith between _____ and _____

on Wednesday or _____ and _____ on Thursday.

RETURN BY 12:00 TUESDAY

TO PHYL O'CONNELL'S BOX

DAVID E. BERLEW

Dr. Berlew is President and Chief Executive Officer of McBer and Company, a division of Sterling Institute. He has special expertise in management development, organizational change, entrepreneurial behavior and economic development.

Prior to joining Sterling Institute in 1968, Dr. Berlew was on the faculty of the Sloan School of Management, Massachusetts Institute of Technology for six years, where he taught courses in organization behavior, group dynamics and human motivation to graduate students and Sloan Fellows. He returned to MIT in 1969 as a Visiting Associate Professor of Psychology and Management.

From 1965 to 1967 Dr. Berlew was on leave from MIT to serve as Country Director of the Peace Corps in Turkey, and then in Ethiopia, with full program responsibility including supervision of approximately 500 Volunteers in each country.

Dr. Berlew participated in Dr. David C. McClelland's early studies on achievement motivation and economic development, and was involved in the research which demonstrated that achievement motivation can be developed through intensive training. In addition, he has conducted research on interpersonal sensitivity, organizational development, and the interaction between individuals and organizations. His papers and articles have appeared in professional journals such as the Administrative Science Quarterly, the Journal of Abnormal and Social Psychology, Industrial Management Review, and Economic Development and Cultural Change. He was a contributing editor - with Warren G. Bennis, Edgar H. Schein and Fred I. Steele - of Interpersonal Dynamics: Essays and Readings on Human Interaction (Dorsey Press).

Dr. Berlew has served as a consultant to a wide range of private and public organizations, including the American Telephone and Telegraph Company, General Electric, the National Society for Crippled Children and Adults (Easter Seal Society), Aetna Life Insurance Company and the American Management Association. Since joining the Behavioral Science Center as Chief Executive Officer, Dr. Berlew has served as a consultant to Qantas Airlines, Bundy Corporation, National Association of Mutual Savings Banks, PepsiCo, Inc., Pepsi Cola Metropolitan Bottling Company, Office of Economic Opportunity, Economic Development Administration, United Nations Industrial Development Organization, United States Navy Chaplain Corps, Peace Corps, Washington, D. C. and Boston School Departments, Irish Management Institute, and Curacao Chamber of Commerce and Trade. In addition, he has addressed numerous professional and trade associations.

DAVID BERLEW (continued)

Dr. Berlew received a Bachelor of Arts degree from Wesleyan University, and a Master of Arts degree from Harvard, both in psychology. He holds a Ph.D. in Social psychology from Harvard's Department of Social Relations, where he was a Ford Foundation Fellow. He is an associate of the National Training Laboratories, a member of the American Psychological Association, a member of the Review Committee of the Venture Research and Capital Corporation, and a Trustee of the Human Development Foundation.

STEPHEN H. RHINESMITH

Mr. Rhinesmith is Director of International Services with McBer and Company. He has expertise in international management, research and training, and his special interest is cultural influences on organizational relations and the management of human resources of multinational organizations.

Mr. Rhinesmith has conducted management programs in Europe, Asia, Africa and Latin America, most recently completing a feasibility study of entrepreneurial training in Africa and Latin America for the United Nations Industrial Development Organization.

As the former Executive Director of Intercultural Training and Research Associates, Mr. Rhinesmith has experience in both intercultural training and organization development activities. His work with government, business and religious organizations has included the development of programs in intercultural and organizational relations for the U.S. Agency for International Development, Westinghouse Electric Corporation and the National Council of Churches.

Prior to joining McBer and Company, Mr. Rhinesmith conducted a review of the educational activities of the German Development Institute in Berlin in order to improve training for Germans preparing to work in developing countries. In addition, Mr. Rhinesmith has served the Peace Corps as a consultant on staff development and program design. He has been involved in four Peace Corps training programs, has served as a program consultant for Regional Training Conferences with the Africa, North Africa, Near East and South Asia, and the Latin America Regions, and presently serves as a management development and training consultant to the Peace Corps staffs in Ghana, Kenya and Costa Rica.

Mr. Rhinesmith has published numerous articles in professional journals including a recent article, "Developing the International Executive," which appeared in European Business. He will soon publish another article, "A Behavioral Approach to International Management Training" in the Advanced Management Journal.

Mr. Rhinesmith holds a faculty appointment as Visiting Research Associate of Public Diplomacy, Fletcher School of Law and Diplomacy, Tufts University. He is a professional member of the National Training Laboratories for Applied Behavioral Science and a member of the American Society for Training and Development. He received a Bachelor of Arts degree from Wesleyan University and a Master of Public and International Affairs degree from the University of Pittsburgh Graduate School of Public and International Affairs.

3/2/71

MEMO

To: Staff
From: Phyl
Re: Monday's Staff Meeting with Messrs. Dave and Steve

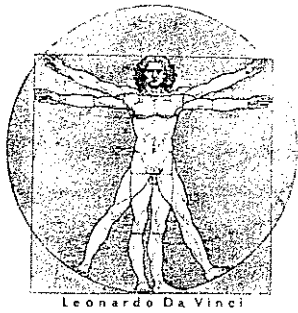
Accomplished - many things! If you missed the meeting, do get a briefing from staff who participated. The meeting adjourned with one Task completed (truly!!).

The Task:

1. Define optimal role of persons manning exhibits in the Visitor Center and have plan ready to implement.
2. Delineate a plan of action to have role definitions prepared and implemented by March 22nd --
- who, what, when, to whom, who approves, who implements?

Task Groups' reports were evaluated and the following resolution adopted:

1. Who develops plan? March 3rd
Maury
School Services representative (volunteer) - *Candy W.*
Co-op (volunteer) - *Marion*
2. What is covered by plan?
Rules and roles on specific exhibits
Job descriptions
Functions - recruitment, selection, training, supervision, evaluation
3. Who approves plan? March 17th
Phyl in absence of V.C. Director
Memo of understanding to staff
4. Who implements plan? March 22nd
Maury, Marion, V.C. Asst. Manager
5. Who evaluates plan? May 22nd
Phyl



McBER and COMPANY A Division of Sterling Institute

675 MASSACHUSETTS AVENUE • CAMBRIDGE • MASSACHUSETTS 02139
617/864-8500

OFFICES:

2600 VIRGINIA AVENUE, N.W. • WASHINGTON • D.C. 20037 • 202/965-1100
116 SOUTH 7th STREET • PHILADELPHIA • PENNSYLVANIA 19106 • 215/627-5316
32 NETAJI SUBHASH MARG • DELHI 6 • INDIA • 277-584

March 4, 1971

Mr. Michael Spock
Director
Children's Museum
Jamaicaway
Boston, Mass.

Dear Mike:

This is to confirm our understanding with you of the current state of affairs with regard to the Museum's organization development project and to lay out plans for the next steps to be taken.

First, with regard to interviews, we feel that we have gained a fairly good grasp of the major issues confronting the Museum through the interviews which Steve conducted last week. We would like to interview a few key Board members and one or two other staff members at the Museum, but do not feel that the cost involved in interviewing all staff members would provide an incremental benefit in terms of additional information which makes the investment worthwhile. Instead, we are sending a data-collection packet for all staff members and Coops which we hope will supply us with the additional information which we consider essential to our discussions with you during the next few weeks concerning the future directions of the Museum.

Second, our experience during the last week with interviews and the Visitors' Center meeting has convinced us that we should postpone any more meetings of that kind, as well as the Retreat itself, until we have had more time to analyze the information we now have and will be collecting during the next week or so, and to work with you to explore its implications for the future of the Museum. We have become firmly convinced that the staff will be able to apply itself much more effectively both in meetings and elsewhere, once the general directions and organizational design of the Museum have been established.

We would propose the weekend of May 1-2 for the Retreat. By that time, we are confident that the general goals of the Museum will have been clarified and we can concentrate on helping staff members to define their roles and responsibilities, as well as the most effective ways of working together to achieve the organization's objectives.

We have enclosed enough copies of two data collection instruments so that every member of the Museum staff, including Coops, can be given them to fill out. One instrument, the Projection to 1975, will provide us with information on how various staff members see the future of the organization as well as its present strengths and weaknesses. The second instrument, the Climate (or Work Environment) Survey Questionnaire, will tell us something about the way staff members perceive the climate or working environment at the Museum, as well as information about what they think the climate should be.

We recognize that some staff members may be reluctant to fill out "another form." Individuals whom we interviewed may feel that they have already provided us with some of the information requested. We are hopeful, nonetheless, that most if not all the staff will fill out the forms. Time and money will not allow us to interview as many people as we would like (we have already had to cancel some interviews) and we would like to have everyone's input. The climate data will give us information that can be quantified, and compared with similar data from many other organizations. It will also be extremely helpful in trying to create a more desirable climate.

We are not asking individuals to sign their names to the two data collection instruments, but it would be extremely helpful if they would note their department and whether they are part-time or full-time, Coop, etc. on each of the two forms so that we can use it in our analysis. I would suggest that you ask them to complete the forms and drop them off at some central point, perhaps in a sealed envelope, so they can then be passed on to us. If possible, we would like to have all the data back by March 15 or shortly thereafter so we can begin to analyze it.

We hope these suggestions are in agreement with your present perspective. We look forward to continued work with you, Phyl and the rest of the staff. If you have any specific reactions to our proposals, please do not hesitate to contact us.

Sincerely,

Steve

Stephen H. Rhinesmith
Director,
International Services

Dave

David E. Berlew
President

Climate Survey

Perhaps the most powerful and objective instrument that we used with McBer were survey questionnaires that assessed the staff climate (work environment) of the Musuem.

The questionnaire consists of 33 questions that allow staff to respond *What the Climate Is* by answering if you **definitely disagree**, **inclined to disagree**, **inclined to agree**, and **definitely agree** to such questions as:

1. The assignments in this organization are clearly defined.
2. Our management isn't so concerned about formal organization and authority, but concentrates instead on getting the necessary people together to do the job.
3. In this organization we set very high standards for performance.

And etcetera for all 33 questions.

Next, staff is asked to repeat the questionnaire except the questions are structured so you can answer *What the Climate Should Be*:

1. The assignments in this organization should be more clearly defined.
2. Our management should not be concerned about formal organization and authority, but should concentrate instead on getting the necessary people together to do the job.
3. In this organization we should set much higher standards for performance.

And etcetera for all remaining 30 questions.

Both questionnaires are scored for each staff members on several dimensions such as xxx, xxx, xxx, xxx, and xxx and displayed in a graph that shows what the climate is versus what the climate should be, the spread in scores on each dimension of the graphic demonstrates how far the staff perceived the problem *is* versus how far the climate *should be*. [chart: staff climate.pdf]