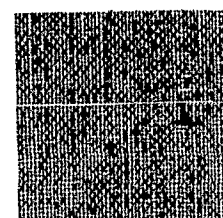


Materials relating to a conference on personnel counseling, January 24-25, 1961.

INDEX

1. Correspondence
2. Minutes
3. Longhand Notes and Outlines
4. Background Material



UNIVERSITY OF WISCONSIN - MILWAUKEE

CONFEREES

PERSONNEL COUNSELING CONFERENCE

A. C. Moore	Kearny
H. M. Boardman	
E. C. Tessman	Hawthorne
L. Sheppard	Baltimore
J. M. Childs	Headquarters
Albert Entwistle	Canadian Bell
Lyman Thayer	Ohio Bell
Ian Ross	Bell Labs
D. J. O'Neil	A. T. & T.

Tentative Additions

Don Powell	Oklahoma City
J. J. Kaufmann	Omaha
D. D. Davisson	Public Relations

*Mr. Dickson
Bill -
Let's go ahead
with the exploratory
meeting. Geo 12/19/60
Reviewed orally with Mr. Hertenstein
per Mr. A. Hanna
12/19/60*

DEC 19 1960

MR. E. W. HERTENSTEIN

As you are probably aware, the Western Electric Company, for a period of twenty years, 1936 - 1956, carried on a personnel counseling program at Hawthorne, Kearny, Baltimore and, for a time, at Headquarters. This activity was a direct outgrowth of the Hawthorne Studies and represented an effort to apply some of the findings from that research, particularly those pertaining to the usefulness of the personal interview as a tool for improving employee relations.

While this program was in operation it attracted considerable favorable attention in numerous other companies both in this Country and abroad. This work also gained favorable attention among most of the colleges and universities in the United States, Canada, England, Australia and various European countries, particularly Norway, Sweden, Denmark, Holland, Belgium, France and Switzerland. The program was also introduced in the Ohio Bell Telephone Company and in the Canadian Bell Telephone Company where it evolved from their earlier experiences in interviewing much as had occurred at Hawthorne.

The program has been permitted to lapse in all locations where it was undertaken except on a moderate scale at Baltimore and Hawthorne. At no location are people assigned to this activity on a full time basis.

During the past few months, Mr. Ian C. Ross of the Communications Social Science Research Unit at the Bell Laboratories has evinced considerable interest in the possibilities of adequately recording this experience and evaluating it both from the standpoint of its theoretical implications and possible future applications. The effort required in an undertaking of this sort would be substantial and should be thought of as having the form of a book.

We, too, have been aware for some time of the need for undertaking a review of this work. There are a number of reasons for this, some of the more important of which may be mentioned.

First, such a descriptive study would enhance our understanding of our present situation with respect to supervisory functions and supervisory training. The years of experience in counseling can be conceived of as a phase in the development of our present concepts of the role of the supervisor and the human relations skills with which he should be equipped. To trace these developments in the

DEC 19 1960

light of the problems out of which they emerged would enable us to gauge the extent to which our present endeavors are meeting these old needs and old problems.

Second, an historical review should enable us to ascertain the extent to which there exists current unmet needs of a counseling nature. In this we would wish to give particular attention to the ways in which counseling may be useful in assisting the individual employee to achieve his maximum potential in the enterprise. In this we would be addressing ourselves to some of the little understood, but most valuable, uses of counseling as a stimulant to creativity and personal growth, both of which areas are of current concern. ? Pk

Third, we need to examine the training potential of counseling both for people engaged in this activity and for others engaged in all phases of personnel work, particularly, placement, training, employment, labor relations, nurses and medical personnel.

Fourth, there is a public relations angle. This has two aspects, one the academic community, the other our colleagues in the industrial relations field. Both the academic and the industrial relations communities responded favorably to this program. The Company achieved widespread recognition as a pioneer not only in the field of counseling, but as an example of forward looking, enlightened Management.

In the literature of business and particularly of the social sciences, there have appeared a number of scattered and rather critical references to the counseling activities of the Western Electric Company. The picture painted by these references is partial and incomplete and in no way does justice to the progressiveness which counseling evidenced in its time. Neither do they in any way explain the events and circumstances which brought about the cessation of counseling as a separate explicit personnel activity.

At the present time there exists no substantive body of data to assist in clarifying the true nature and purpose of this activity in the public's mind. It is important to the Company's reputation as a leader in industrial relations that some effort be made to correct some of the faults and misleading impressions generated by partial and insufficiently documented appraisals of this work.

Finally, there is the further reason that if this work is to be properly recorded and evaluated, it must be done soon. Counseling has now been inactive for a sufficiently long period of time to gain perspective and objectivity toward it. On the other hand, only a few people remain with intimate daily experience with the program throughout its entire course. Also, old files and records get lost or misplaced and lose their import with the passage of time.

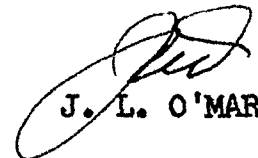
DEC 19 1960

MR. E. W. HERTENSTEIN

3.

As a first step in approaching this unfinished piece of business, we propose to hold a meeting in the near future of individuals, at those locations where the program was undertaken, who had direct responsibility for it. The purpose of bringing this group together would be to determine more explicitly the values there might be in reassessing this activity and also obtain their views on possible future applications. Based upon this preliminary review, we would then plan to develop for your review a concrete proposal indicating recommended future steps in this area.

If you concur in the value of the proposed preliminary meeting, we shall proceed at once to make the necessary arrangements.


J. L. O'MARRA

Conferences

- 1 A.C. Moore - Kearny
- 2 H.M. Boardman - "
- 3 E.C. Teggman - Hawthorne
- 4 ~~L.E. White - Highters~~
- 5 ~~T.M. Childs - "~~
- 6 L.E. Sheppard - Baltimore
- 7 D.J. O'Neil - ATT
- 8 ^{R.K.} (Bob) Greenleaf - ATT
- 9 ^{I.A.} (Jan) Ross - Bell Labs
- 10 ^{B.F.} (Bruce) Gordon - " "
- 11 W.J. Dickinson - Highters (Chairman)
- 12 W.B. Cavan - "
- 13 J.L. O'Mara - " (part time)

CONFEREES
PERSONNEL COUNSELING CONFERENCE

1	A. C. Moore	Kearny
	H. M. Boardman	
2	E. C. Tessman	Hawthorne
3	L. Sheppard	Baltimore
4	J. M. Childs	Headquarters
	Albert Entwistle	Canadian Bell
	Lyman Thayer	Ohio Bell
5	Ian Ross	Bell Labs
6	D. J. O'Neil	A. T. & T.

7 6121

8 6121

Tentative Additions

Don Powell	Oklahoma City
J. J. Kaufmann	Omaha
D. D. Davisson	Public Relations

File

MR. C. R. BERGMANN

From 1936 to 1956 the Company engaged in a rather extensive counseling program. As you know, this work grew directly out of the Hawthorne Studies and represents a major systematic attempt to apply some of the findings of those studies. During the 20 years of its existence the counseling work attracted widespread attention in this country and abroad and has been referred to in many textbooks and articles.

Since we are one of the few companies having extensive experience with counseling, it would seem most appropriate that this experience be added to available knowledge about managing people.

Our informal investigations to date indicate there are universities which might be interested in a cooperative effort leading to publication of a book covering our approach to and experience with personnel counseling. In view of the long history of collaboration between Harvard University and the Company during the Hawthorne Investigations and the coauthorship of Professor Roethlisberger and Mr. Dickson in "Management and the Worker," we believe a cooperative effort with Harvard would be the most suitable arrangement.

To accomplish the undertaking we would suggest that Mr. Dickson be assigned full time at the University's location where he could draw on the knowledge of the University staff for consultation and guidance. It would take probably from one to two years to accomplish the research and writing necessary. We would propose that Mr. Dickson's salary, traveling and secretarial expense be covered by the Company and the University provide space, consultation and publication charges. Royalties would be assigned to the University (as was done with "Management and the Worker").

If you have no objection, we will enter into preliminary discussions with the Harvard Business School and possibly one or two other universities (Northwestern or the University of Michigan) leading to submission of a formal proposal to the University.

Attached is a very rough outline to indicate what might be the appropriate scope of the proposed publication.

W. G. DUNN

Att.

JLT:MS

Mr. Thiermeyer:

Would appreciate your
comments on this rough
draft.

LJD 10/26

MR. C. R. BERGMANN

As you know, the Company engaged in an extensive personnel counseling program extending over a period of twenty years, 1936 to 1956. This work grew directly out of the Hawthorne Investigations and represents the only systematic attempt to apply these findings. This program was fully developed at Hawthorne and to a lesser extent at Kearny and Baltimore. During the course of its existence the work attracted wide-spread attention in this country and abroad and has been referred to in many text books and articles.

We have for some time felt that substantial values to the Company, to personnel people and to students of human relations would accrue from a systematic analysis and recording of this experience. It is now proposed that such an effort be made because there remain only relatively few who had extensive direct experience with this activity. Also, the Management people with direct experience with the program are already in many cases retired or deceased. Consequently, if this task is to be done it needs to be done immediately else all possibility of recording this phase of the Company's experience in industrial relations will be lost.

In order to accomplish this objective, it is recommended that W. J. Dickson be given this as a full-time assignment for such time as may be required. It is estimated that this would take between one and two years. Obviously the task of attempting to evaluate this work

C. R. BERGMANN

2.

should be undertaken by someone, preferably outside the Company, since Mr. Dickson was personally identified with the activity. Also, he would need the assistance of one and possibly two other people intimately acquainted with this activity.

We believe that these requirements can best be met by assigning Mr. Dickson on a full-time basis to some university center. In view of the long history of collaboration between the Harvard Graduate School of Business Administration and the Company during the Hawthorne Investigations and the effective working relationship Mr. Dickson had with Professor Roethlisberger, we would recommend this institution as the most suitable place in which to carry out this work. An added reason favoring the Harvard Business School is that Professor Roethlisberger was closely identified with the counseling activity during its formative period, he is also familiar with the Company organization and still retains an acquaintanceship with some of our Management people who had experience with the program in their organizations. With such an arrangement Professor Roethlisberger could, if he is willing, undertake the evaluation of the activity and, thus, collaborate in the proposed project. If you concur in this proposal, we will contact Professor Roethlisberger and, through him, the Dean of the Harvard Business School to see whether suitable arrangements might be worked out.

A summary of the reasons for undertaking this project, together with a tentative outline of the proposed write-up are attached.

W. G. DUVALL

Att.

PERSONNEL COUNSELING IN THE WESTERN ELECTRIC COMPANY

1936 - 1956

Reasons for Undertaking Re-examination of Counseling Experience

1. Understanding of present position regarding:
 - Supervisory functions
 - Supervisory training
2. Examination of remaining counseling problems.
3. Influence on individual for taking his maximum place in the enterprise.
4. Examination of training potential of counseling
 - What did counselors learn?
 - What counseling techniques should be incorporated into contemporary Management and supervisory training programs, especially for investigative, diagnostic and improvement specialists?
5. Public Relations
 - Obligation to industry, intellectual and professional counseling community.
 - Correcting the record.
6. Counseling as a case for Management decision.
7. Needs to be done soon or it can't be done
 - Records get lost or misplaced and lose import with passage of time.
 - Only a few people remain with intimate daily experience with program throughout its entire course. Much of what needs to be said is in the heads of these people.

PERSONNEL COUNSELING IN THE WESTERN ELECTRIC COMPANY

1936 - 1956

I. Concepts and Background

1. What the Company was like
2. How the program started
3. Influence of "Management and the Worker"
4. Initial goals and concepts

II. Operations of the Plan

1. How the plan was organized
2. Selection and training of counselors
3. Extent of counseling
4. Supervision of counselors
5. Reporting results of counseling activity
6. How the counselor related to supervisors, employees and union representatives
7. Obtaining cooperation of employees and supervisors
8. Presentation of counseling to supervisors, Management and unions
9. Reception of counseling by Management, supervisors and union

III. Developments in Methods and Concepts

1. Spread of counseling
 - Hawthorne Satellites, Lincoln, St. Paul, Duluth
 - Other Company locations - Kearny, Baltimore and Headquarters
 - Bell System companies - Chesapeake and Potomac of Washington, Indiana Bell, Canadian Bell, Ohio Bell
2. Later goals of counseling
3. Outside interest in counseling
4. Changing relations with Management
5. Diversity of approaches
6. Experiments in feedback techniques

IV. Values in the Program

1. Actual use made by employees, supervisors and union representatives
2. Effects on Management thinking about employees
3. Effects on Management thinking about supervisors
4. Effects on Management thinking about supervisory training

V. Problems of the Counseling Organization

1. Supervision of counselors
2. Communication of results
3. Selling the program
4. Evaluation of counseling activity
5. Integrating with a larger Company structure

VI. What Happened to the Counselors?

1. Attrition
2. Declining need with changing times
3. Cost squeeze

VII. Approximate Evaluation

1. What employees said
2. What supervisors said
3. Counselors' analyses
4. Line organization reactions
5. Content analyses
6. Examination of actual use made by employees and supervisors
7. Effects on Management training
8. Effects on people counseled
 - Production - Turnover - Attendance - Complaints and grievances
9. Effects on supervisory relationships
10. Effects on communications within organizations participating
11. Effects on the informal organization

VIII. Ultimate Evaluation

1. What did counseling do for the Company?
2. Effect on current policies

IX. Summary and Conclusions

Albert Entwistle -
Canadian Bee

Symon Thayer -
Ohio Bee

Jan Ross
Bee Lab

D. J. O'Neil
ATT.

Powell - Oklahoma
City

McGowan - Oklahoma
Nat.

R. L. Lindsay - Sacardale

Western Electric Company

INCORPORATED

195 BROADWAY NEW YORK 7, N.Y.

AREA CODE 212 WO 4-2100

We are planning, on rather short notice, to have a conference to review the Company's experiences in the field of personnel counseling on December 20, 21 and 22. We have invited a small group of people from within the Western Electric Company who can speak authoritatively about the program at the various Company Locations in which the program was in effect. We would like very much to have you attend this meeting if you can arrange to do so on such short notice.

The purpose of the meeting is to review our experiences with the program for the purpose of determining whether there are values in this experience which we have not as yet realized and, if so, what future steps might be indicated.

If you can come, we would like to have you review for the group your experience with this activity in your Company. We would also appreciate it if you could give us some idea of the kind of documentation with regard to this activity existing in your files.

We plan to hold the meeting here at Headquarters on the 13th Floor of the Woolworth Building, 233 Broadway, in Room 1344. Please let me know whether you can attend.

Sincerely

W. J. DICKSON
Assistant Superintendent,
Personnel Development
and Research

MR. E. W. MOLDT, Superintendent
Personnel Service

Kearny

We would like to have a meeting on January 24 and 25 of those individuals who had close, direct responsibility for personnel counseling at the various locations where the program was in effect.

The purpose of this meeting is to determine whether there is any unfinished business with respect to Personnel Counseling. It will be helpful if the conferees can devote some thought in advance to the following questions to be discussed;

- What has been the experience of each location involved in the Personnel Counseling activity?
- Is there a need for review and evaluation of this experience on a Company basis and if so are there adequate records available?
- Are there values in this experience which are not yet fully realized and if so what future steps are indicated?

I understand that Messrs. A. C. Moore and H. M. Boardman of your organization would be in a position to speak authoritatively with respect to the experience with this program at your location. Please let me know whether they can be spared to attend this meeting.

We have reserved Conference Room B on the fourth floor of the Annex, 172 Fulton Street, for this meeting. If agreeable with you, we will contact Messrs. Moore and Boardman directly regarding further details of the meeting.

WJD 12/28
WJD:PC

J. L. O'MARRA
Superintendent,
Personnel Administration

DEC 20 1941

MR. J. D. STACK, JR.

We would like to have a meeting on January 24 and 25 of those individuals who had close, direct responsibility for personnel counseling at the various locations where the program was in effect.

The purpose of this meeting is to determine whether there is any unfinished business with respect to Personnel Counseling. It will be helpful if the conferees can devote some thought in advance to the following questions to be discussed:

- What has been the experience of each location involved in the Personnel Counseling activity?
- Is there a need for review and evaluation of this experience on a Company basis and if so are there adequate records available?
- Are there values in this experience which are not yet fully realized and if so what future steps are indicated?

I understand that Mr. J. M. Childs is in a position to speak authoritatively regarding the experience with this program in Headquarters Organizations. Please let me know whether he can be spared to attend this meeting.

We have reserved Conference Room B on the fourth floor of the Annex, 172 Fulton Street, for this meeting. If agreeable with you, we will contact Mr. Childs directly regarding further details of the meeting.

12/28
JL

Original
J. L. O'HARRA

MR. H. S. BROWN, Superintendent
Personnel Service

Hawthorne

We would like to have a meeting on January 24 and 25 of those individuals who had close, direct responsibility for personnel counseling at the various locations where the program was in effect.

The purpose of this meeting is to determine whether there is any unfinished business with respect to Personnel Counseling. It will be helpful if the conferees can devote some thought in advance to the following questions to be discussed:

- What has been the experience of each location involved in the Personnel Counseling activity?
- Is there a need for review and evaluation of this experience on a Company basis and if so are there adequate records available?
- Are there values in this experience which are not yet fully realized and if so what future steps are indicated?

I understand that Mr. E. C. Tessmann of your organization would be in a position to speak authoritatively with respect to the experience with this program at your location. Please let me know whether he can be spared to attend this meeting.

We have reserved Conference Room B on the fourth floor of the Annex, 172 Fulton Street, for this meeting. If agreeable with you, we will contact Mr. Tessmann directly regarding further details of the meeting.

WJD:EC
12/28

J. L. O'MARRA
Superintendent,
Personnel Administration

DEC 29 1960

MR. J. S. MEHRING, Superintendent
Industrial and Labor Relations

Baltimore

We would like to have a meeting on January 24 and 25 of those individuals who had close, direct responsibility for personnel counseling at the various locations where the program was in effect.

The purpose of this meeting is to determine whether there is any unfinished business with respect to Personnel Counseling. It will be helpful if the conferees can devote some thought in advance to the following questions to be discussed:

- What has been the experience of each location involved in the Personnel Counseling activity?
- Is there a need for review and evaluation of this experience on a Company basis and if so are there adequate records available?
- Are there values in this experience which are not yet fully realized and if so what future steps are indicated?

I understand that Mr. L. E. Sheppard of your organization would be in a position to speak authoritatively with respect to the experience with this program at your location. Please let me know whether he can be spared to attend this meeting.

We have reserved Conference Room B on the fourth floor of the Annex, 172 Fulton Street, for this meeting. If agreeable with you, we will contact Mr. Sheppard directly regarding further details of the meeting.

WJD 12/28
WJD/PC

J. L. O'MARRA
Superintendent,
Personnel Administration

WSD 1/13

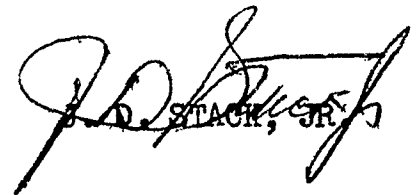
January 12, 1961

MR. J. L. O'MARRA 1/13

This is in answer to your memorandum regarding the Personnel Counseling meeting to be held on January 24 and 25.

Mr. J. M. Childs will gladly attend the meeting, but because of the heavy schedule in our Management Training Program, he will be free to attend only on January 24. Mr. L. E. Glick is interested in this meeting and will be able to attend part of the session on January 24.

Thank you for your interest in our representation at this meeting.


J. D. STACK, JR.

JAN 13 1967

MR. R. K. GREENLEAF
American Telephone and Telegraph Company
195 Broadway
New York 7, New York

Dear Bob:

I am attaching a copy of a letter sent to the interested Superintendents of Personnel in our Manufacturing Division inviting people who had been closely identified with the personnel counseling program to attend our meeting January 24 and 25.

The people invited were A. C. Moore and H. M. Boardman from Kearny, E. C. Tessmann from Hawthorne, L. E. Sheppard from Baltimore and J. M. Childs from our Headquarters Personnel Organization. All of these have accepted as of this time except Mr. Sheppard of Baltimore. In addition, Ian Ross and Dan O'Neil have indicated an interest in attending. Jack O'Marra, to whom I report, and Larry Glick may also attend at least part of the time.

As I indicated to you, this is intended to be an exploratory meeting and will center around the three questions indicated in the attached letter.

I am very pleased that you will be able to attend this meeting. It will be held in Conference Room B on the fourth floor of the Annex, 172 Fulton Street, commencing at 9:30 Tuesday morning, January 24.

Sincerely

Original Signed By
W. J. Dickson

W. J. DICKSON
Assistant Superintendent,
Personnel Development
and Research

WJD:VP

Att.

JAN 13 1964

MR. I. C. ROSS
Bell Telephone Laboratories, Incorporated
Mountain Avenue
Murray Hill, New Jersey

Dear Ian:

Our plans for the conference on personnel counseling are pretty well settled now and I thought I should confirm the time and place of the meeting and fill you in on those who are likely to attend.

The meeting is scheduled for January 24 and 25 at Conference Room B on the fourth floor of the Annex, 172 Fulton Street. We expect to get underway at 9:30 Tuesday morning.

Those who have indicated that they will attend are Kelly Tessmann from Hawthorne, Art Moore and Hank Boardman from Kearny and Jim Childs from Headquarters. We have not heard from Larry Sheppard from Baltimore as yet, but chances are he will be there too. In addition, Larry Glick wants to sit in part of the time and Dan O'Neil and Bob Greenleaf have indicated that they will attend.

I am attaching a copy of a letter sent out to the interested Superintendents of Personnel in the Manufacturing Division inviting those who were close to counseling to attend. As you know, the meeting is purely exploratory and might well center around the three questions contained in the letter.

I sent Kelly Tessmann a copy of the memorandum which I prepared for our Line based on our conversations. In addition, I took the liberty of sending him copies of the outlines developed in our discussion in your office as well as your memorandum for file attached to your note of December 12. I thought he, at least, should be pretty well filled in on all that has transpired so far. A copy of the memo I sent up our Line is also attached in case you are interested.

If you have any further thoughts on this meeting, please call me as I think that the future steps that might be taken insofar as our Company is concerned will hinge pretty directly on the outcome. In any case, I will look forward to seeing you on the morning of January 24.

Sincerely

Original Signed By

W. J. Dickson

W. J. DICKSON

Assistant Superintendent

Personnel Development

and Research

WJD:VP

Att.

UNIVERSITY OF WISCONSIN - MILWAUKEE

January 17, 1961

STATLER HILTON HOTEL
Seventh Avenue and 33rd Street
New York, New York

Attention: Reservations

Gentlemen:

This will confirm our telephone conversation arranging for a room for Mr. E. C. Tessman, Western Electric Company, Hawthorne Works, Chicago, Illinois for afternoon arrival on Monday, January 23. Mr. Tessman will be in the city through Wednesday night.

Very truly yours

Original Signed To
W. J. Dickson

W. J. DICKSON
Assistant Superintendent,
Personnel Development
and Research

WJD:VP

January 17, 1961

E C TESSMAN WECCO 6 N MICHIGAN AVENUE CHICAGO 2 ILLINOIS

WE HAVE RESERVED A ROOM FOR YOU AT THE STATLER-HILTON HOTEL FOR
AFTERNOON ARRIVAL JANUARY 23.

W J DICKSON

WJD:VP

Personnel - 251

2188

3:35

Original Signed By

UNIVERSITY OF WISCONSIN - MILWAUKEE

Western Electric Company

INCORPORATED

**BALTIMORE WORKS
2500 BROENING HIGHWAY
BALTIMORE 24, MARYLAND
AREA CODE 301 OR 5-9000**

**J. S. MEHRING
SUPERINTENDENT, INDUSTRIAL
AND LABOR RELATIONS**

W. J. L. O'Marra 1/19

JAN 18 1961

MR. J. L. O'MARRA, Superintendent,
Personnel Administration

195 Broadway

This is in reply to your letter of December 29, 1960, relative to the proposed meeting of January 24 and 25 on Personnel Counseling.

We shall be glad to have Mr. Sheppard attend your meeting, and it is agreeable that you contact him directly regarding further details.

J. S. Mehring
Superintendent, Industrial
and Labor Relations

BELL TELEPHONE LABORATORIES

INCORPORATED

MURRAY HILL, NEW JERSEY

TELEPHONE

AREA CODE 201

LOCAL 582-3000

March 8, 1961

MR. W. J. DICKSON ^{3/8}
Assistant Superintendent
Personnel Development and Research
Western Electric Company
195 Broadway
New York 7, New York

Dear Bill:

The Personnel Counseling Conference minutes of January 24-25, 1961, are an excellent, concise summary of what transpired.

I have an unfavorable "gut" reaction to the minutes as a whole as a persuasive document for convincing top management that you and "Kelly" should be released to undertake such a task.

I would like to suggest that a summary of these minutes be prepared for transmission to Mr. Bergmann to emphasize the following themes from the minutes.

1. The counseling experience was essentially a series of field experiments in human relations. This experience was not identical at each of the locations but varied to suit location needs. Such variation provided a complex but unusually rich source of material which the conferees believed could best be recorded for maximum utility in the form of a book. Such an undertaking would, as a minimum, require the full time of two people for a period of a year.
2. The reasons cited for such an undertaking by the conferees were:-

(Items 1-6, pages 8 & 9 of the minutes)
3. This would be followed by a brief description of available records and personnel associated with counseling, who are still with the Company, as source material for the book.

Mr. W. J. Dickson - 2

It is my feeling that proposals for future steps (page 10 of the minutes) should not be included. If the book is written, the desirability of such future steps will be as evident to those that read it as it is currently to the conferees.

Sincerely yours,



B. F. GORDON

MH-122-BFG-HS

Western Electric Company

INCORPORATED

KEARNY WORKS

100 CENTRAL AVE. KEARNY N.J.

MITCHELL 2-7700

March 13, 1961

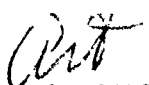
MR. W. J. DICKSON^{3/16}, Assistant Superintendent
Personnel Development and Research
195 Broadway

Mr. Boardman and I have discussed the attached copy of the minutes of your conference on Personnel Counseling and have no corrections or suggestions to offer. We feel that the report presents an accurate condensation of the discussions.

We also are in agreement with the proposal to recommend that steps be taken to write up the counseling experience.

In our opinion recommendations for future research should be based on a management interest which could develop from an objective report of the counseling experience rather than on suggestions from members of the conference.

We are prepared to give you a narrative account of the Kearny Counseling activity when your recommendation to write up the Counseling experience is approved.


A. C. MOORE
Assistant Superintendent
Employee Benefits and Safety

Western Electric Company

INCORPORATED

SUPERVISORY INDOCTRINATION

HAWTHORNE TRAINING CENTER

6 N. MICHIGAN AVENUE CHICAGO 2, ILL.

ANDOVER 3-7637

March 21, 1961

MR. W. J. DICKSON $\frac{2}{3}$

195 Broadway

This is in reply to your letter of March 1st attaching minutes of the January conference on Personnel Counseling. There are two small additions which I suggest be included in Hawthorne's account. The first is in Paragraph 2, bottom of page 2, and the second on page 11, under "Hawthorne". Copies of the paragraphs with suggested additions are attached.

The minutes of the meeting were routed to the 4000 Organization Industrial Relations Manager. He in turn reviewed them with the Works Manager. Mr. Regur - 4820 suggests that the following statement be included in our reply.

"With the decentralization of certain manufacturing operations at Hawthorne along with reduction in our work load, we are facing more and more pressure to reduce our expense roll. In view of this, we are not necessarily looking for extra assignments that might increase the expense ratio."

"Nevertheless, since the Hawthorne Experiments centered around this location and the fact that we have most of the data and many ex-counselors, it would appear that our location should play some vital part in the preparation of the data in line with the current objectives. The degree to which we would participate would have to depend somewhat on top Management's interest due to increased expense help."

"I think we all agree that the Hawthorne Experiments and the text 'Management and the Worker' gave us a good international image. I am sure additional data on this subject would do likewise, and from a college relations standpoint, get our Company name and materials back in current text books."

Hawthorne continues to have a Personnel Counseling and Research Section. My return to the Works Training Department after March 20 will make it more convenient to enter into possible activities related to counseling.

Limitations on available time have made it impossible for me to prepare a preliminary draft covering the Hawthorne experience.

MR. W. J. DICKSON

2

March 21, 1961

It seems that a draft should go beyond where we are today in our outlining. It would call for a thorough examination of counseling records, a testing of one's own assumptions, and an ordering of pertinent facts and events in a manner that would give stature and meaning to the work. It would undoubtedly be a revealing and rewarding experience to undertake this study.

ECT:JG

E. C. TESSMAN, Supervisory Training
and Counseling Research Department

Att.

Copy to
D. L. Regur, Hawthorne

PAGE 2, PARAGRAPH 2

The Hawthorne representative recounted the history of counseling activity there covering its developmental phases during the period 1936 - 1940, its growth and consolidation during the war years and after up to 1947; its diminution during the years that followed, up to its suspension in 1956, and its present status of one Personnel Counseling Research Section, with no personnel assigned. In this description the experimental nature of the program during its developmental phases was emphasized. It was pointed out that counseling at Hawthorne was characterized by a close integration of the counselor in the work situations to which he was assigned. The counselors acquired a deep understanding of the activities, attitudes, and informal organization of the groups with whom they worked. Generally, the counselors were well accepted by employees, shop stewards and line supervision. This acceptance was fundamental to the effective operation of the program. It was not easily gained, and required constant effort and attention to maintain.

PAGE 11, "HAWTHORNE"

A large volume (24 file drawers) available covering entire span of the activity. Includes individual cases, group studies, supervisory studies, interviews of special interest, minutes of meetings, reports to Management, special research projects, personnel records, etc.

AMERICAN TELEPHONE AND TELEGRAPH COMPANY

195 BROADWAY, NEW YORK 7, N. Y.

AREA CODE 212
EX 3-9800

April 6, 1961

Mr. W. J. Dickson, ^{4/6}Assistant Superintendent
Personnel Development and Research
Western Electric Company
195 Broadway
New York 7, N. Y.

Dear Bill:

After consulting with my advisors I arrive with two conclusions:

1. It would be a good notion to write the story of Hawthorne counselling. The reasons are difficult to state in ways which have a direct bearing on the earnings of the Company. They relate more to the advantages which came from publishing Management and the Worker. These primarily were the good impression of the Western Electric Company achieved by it in the colleges, and the educational value it had for industrial relations people in the System and in the industry generally. As a result, other personnel programs in this and other businesses benefited considerably.

2. The outline covers too much territory. The write-up should be confined to what was done at Hawthorne. Then it could be a natural extension of Management and the Worker. It is evident from the minutes that the basic information elsewhere is sketchy at best. There is even some doubt whether what was done in some other places had any relationship to the Hawthorne work other than the name of the program.

The only suggestions made on the minutes concern organizing them under subject headings and possibly writing a brief summary.

Sincerely,


D. J. O'Neil

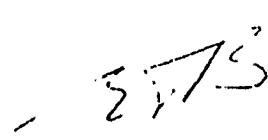
I am also sending you a copy of what Bill Borden gave me.

Mr. O'Neil:

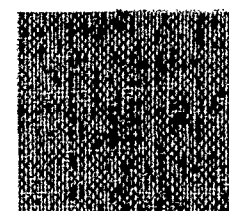
I think a piece of writing such as outlined can and probably should be done. It will give a picture of counseling that has never been available to anyone beyond the inner circle and will therefore be of interest to students of personnel problems in the educational and business world.

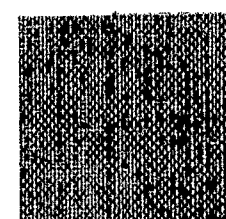
In the summary and conclusions (Chapter IX) I hope that some recognition is given to such points as -

1. Counseling activity per se probably requires a depth and breadth of training and insight into human experience greater than admitted by those of us involved in it. The goal-setting process and the achievement of goals which some people manage better than others in the struggle between the individual and the organization needs more understanding than the counseling group attained. This may have handicapped them in re-formulating their goals at crucial points in their history.
2. Counseling is meaningful only as a long-range, evolving part of a larger effort to build and maintain a vital organization. Without a continuing commitment to this at the very top of an organization such an activity is bound to die. With the fairly frequent changes in top level management bringing, as they did, differing philosophies of management at Western, no program dependent on long-range support could have survived.
3. This was an idealistic program and all idealistic programs have to be reconciled to something less than they want in the market place.


G. T. Bowden

MISSING





UNIVERSITY OF WISCONSIN - MILWAUKEE

*Mr. Dickson 3/1
to brief Board
to brief Board
Mr. Bergmann?*

MAR 1 1961

2/1
MR. J. L. O'MARRA

I am attaching a copy of the minutes of our Conference on Personnel Counseling held January 24 and 25.

I would appreciate your making any corrections or notations on this copy and returning it to me at your earliest convenience. Upon receipt of your corrections and suggestions these minutes will be reissued.

We plan to transmit a copy to Mr. Bergmann, the Personnel Director, with a recommendation that steps be taken to write up the counseling experience. I would be glad to know whether you have suggestions for any other future steps to include in this letter.

W. J. Dickson
W. J. DICKSON

Att.

Memorandum to:

A. C. Moore, Kearny
H. M. Boardman, Kearny
E. C. Tessman, Hawthorne
L. E. Sheppard, Baltimore
D. J. O'Neil, A. T. & T.
R. K. Greenleaf, A. T. & T.
I. C. Ross, Bell Laboratories
B. F. Gordon, Bell Laboratories
J. L. O'Marra
W. B. Cowan

PERSONNEL COUNSELING CONFERENCE

January 24 - 25, 1961

195 Broadway

Attending the Conference were:

A. C. Moore	Kearny
H. M. Boardman	Kearny
E. C. Tessen	Hawthorne
L. E. Sheppard	Baltimore
D. J. O'Neil	A. T. & T.
R. K. Greenleaf	A. T. & T.
I. C. Ross	Bell Laboratories
B. F. Gordon	Bell Laboratories
W. J. Dickson	Headquarters (Chairman)
W. B. Cowan	Headquarters
J. L. O'Marra	Headquarters (Part time)

This conference was called to consider the following questions:

What has been the experience of each location involved
in the Personnel Counseling activity?

Is there a need for review and evaluation of this ex-
perience on a Company basis, and if so, are there
adequate records available?

Are there values in this experience which are not yet fully
realized, and if so, what future steps are indicated?

The chairman began the discussion by mentioning that some time ago
Mr. A. P. Clow, during an informal discussion, had raised a question
as to whether the Company was missing potential values from its

experience with Personnel Counseling. More recently Mr. Ross, of the Laboratories, had recommended that the experience should be recorded for the benefit of everyone concerned with personnel theory and practice, and had inquired as to the possibility of such an undertaking. This conference had been initiated as a result of later discussions among the representatives of the Laboratories, American Telephone and Telegraph, and Western Electric, who had been considering informally the desirability of reviewing the Personnel Counseling experience in terms of its unexploited values. The Conference group began its review by having those individuals who had extended personal experience with the program at the various locations outline these separate developments.

The Hawthorne representative recounted the history of counseling activity there covering its developmental phases during the period 1936 - 1940, its growth and consolidation during the war years and after up to 1947; and its diminution during the years that followed up to its suspension in 1956. ^{and its present status of one Personnel Counseling research section with no personnel integrated,} In this description the experimental nature of the program during its developmental phases was emphasized.

It was pointed out that counseling at Hawthorne was characterized by a close integration of the counselor in the work situations to which he was assigned. The counselors acquired a deep understanding of the activities, attitudes, and informal organization of the groups with whom they worked. Generally, the counselors were well accepted

by employees, shop stewards and line supervision. This acceptance was fundamental to the effective operation of the program. It was not easily gained, and required constant effort and attention to maintain.

In the Hawthorne program attention was focused on the non-directive interview as an aid in improving employee relations. Interest centered on the employee as a person and the counselor's role was to provide a situation in which the individual would feel free to discuss anything that concerned him, including his own personnel development. The administration problems attendant upon the high rate of expansion of the activity and the necessity for intensive training for a relatively large number of counselors was mentioned as well as activities concerned with evaluating results of the program. The latter consisted chiefly of ^{testimonials} ~~testimonials~~ from employees and supervisors, case studies, content analyses of interviews, ~~admission~~ ^{and} turn-over ^{and} "State of the Nation" reports ~~as well as~~ conferences with counselors by higher Management. The extensive amount of interest in the program manifested by numerous visitors from the academic and business worlds, both in the United States and abroad, was alluded to also. The description of the Hawthorne Program was concluded with observations on the impact of the activity on supervisory training, the need for further work on the interviewing process, and the limitations on counseling by the supervisor resulting from his role and position in the structure.

The history of counseling at Baltimore was outlined from its beginning in 1937 on down to the present time. It still continues on an attenuated basis. The Baltimore representative said that his organization had followed the pattern of the Hawthorne Plan throughout its history. In detailing developments at Baltimore the following points

4.

were stressed:

1. the unique contribution of counseling as a problem-solving aid for individual employees,
2. its considerable contribution to the organizations' problems of absenteeism and turnover, and
3. the contribution to the line supervisor of a human relations point of view.

The Baltimore representative also stressed the considerable efforts made to make the activity meaningful to Management at higher levels and the variable success achieved. He concluded by affirming that many of the problems to which counseling was addressed continued today without adequate effective attention. This view was concurred in by Hawthorne and Kearny representatives. //

The two Kearny representatives discussed the history of the activity there from 1943 to 1958. It was pointed out that up to the end of the War the program was carried on much as it had been at Hawthorne with strong support at the top Management level and general acceptance by supervisors, employees, and the Union Organization.

Later the supervisors of the activity became increasingly concerned with the lack of real understanding of counseling by supervisors and with the line organizations' lack of attention to human and personnel problems in the face of the pressures of rapid changes in operations during the years after the War. It was explained that these circumstances led to the search for a device through which the attention

and understanding of human problems could be brought more directly to supervisors' attention. The method of "attitude surveys" was outlined including the use of first, interviews, and later, a combination of questionnaire and interviews. The results attributed to this approach were more effective comprehension of organizational problems by supervisors as well as their greater acceptance of the attitude survey approach as contrasted with the "pure" interviewing approach. The Kearny representatives made clear their feeling that a counseling program is more successful when it provides for participation of supervisors in personnel problems brought to the counselor's attention.

The introduction of a Personnel Counseling Program at Company Headquarters in 1947 was discussed next. The general procedures used in introducing the program, including letters of announcement signed by higher Management and circulated to all supervision, and intensive efforts to explain the program through discussions with all levels of supervision were covered. In retrospect it was suggested that too much was attempted in too short a time in transplanting an activity developed at another location without sufficient groundwork. Reference was also made to a later experimental attempt to have the counselor focus his attention on working directly with supervisors and to a reduced extent with non-supervisors.

One of the A. T. & T. representatives reviewed his experience as an observer of counseling programs in the Operating Telephone Companies.

He discussed the Hawthorne visits of System personnel to observe and explore the experience there, and a two-week meeting on the subject of counseling held at Hawthorne for higher level System personnel people. The programs later inaugurated in the Chesapeake and Potomac, Indiana, Ohio, and Canadian Companies were described briefly. These programs were characterized as not altogether well-planned in that most of those concerned with them were inexperienced and untrained in the activity. In the Ohio Company, however, the program was introduced with attention to the careful selection of experienced supervisory personnel, full-scale orientation meetings with all levels of Management, and careful selection and training of counselors. The discontinuance of Operating Company Programs was attributed to the problem of measuring the effectiveness of the Program, the apparent high cost for Company-wide coverage, and the lack of experience with, and understanding of, the activity by many concerned with it.

Following this historical review of counseling experience, the chairman restated the original objectives of counseling as:

1. To furnish Management with information on attitudes.
2. To provide a counseling service to employees.
3. To develop data for research purposes.

These were later modified to place primary emphasis on providing counseling service, and at Kearny, direct efforts were made to enhance the supervisors' grasp of human relations matters through

attitude surveys. The group concurred in the conclusion that whatever the efforts made to adapt or modify the counseling activity to meet the demands made of it, none of them could adequately satisfy its critics. This observation led to a discussion of various factors contributing to the almost complete suspension of counseling. Among the more frequently mentioned items were:

1. The difficulty of communicating an adequate understanding of the program to some people in Management and the difficulty of satisfying demands for quantitative evaluation of results.
2. The evident great effect of changes of top management personnel in strategic positions.
3. A shift in interest from dealing with individuals to dealing with groups probably due to the rise of labor unions.
4. The not inconsiderable cost of maintaining counseling on a System-wide or even a Company-wide basis.

The conferees next developed two questions about which the remaining discussion in this meeting was organized. These were:

1. How can the counseling experience be communicated so as to contribute to the current state of development in the Personnel Field?
2. What other possible direct applications of counseling exist?

In the course of the discussion of the first question, a number of aspects were considered. There was a discussion of to whom an account of the experience should be communicated. Suggested audiences included top Management, line supervisors, personnel and medical specialists as well as people in these groups in other companies, and social science professionals at large. It was agreed that any such communication should be directed at achieving maximum relevance to present conditions. Some conferees felt that in the light of the almost complete suspension of counseling, it might be difficult to prepare a positive account of the activity. A view shared by most of those present was that the ultimate product should be in the format of a book or document comprehensively covering the Company's experience with the program. It was agreed that only an effort of this size could do justice to the significance of the subject, and that only in this form could the account be made fully available to all who might be interested.

Among the reasons cited in the course of the discussion in support of a comprehensive recording of the Counseling experience were the following:

1. Counseling provides an extremely rich experience upon which people within and outside the Bell System might draw.
2. Western's experience has not been adequately recorded; if not set down soon, it will be lost.

3. References in management and social science literature are partial; these do not adequately represent the development - reasons for suspension are left unclear.
4. Western has an obligation to the business community (as suggested by Mr. Kappel in the McKinsey Lectures) to make available its experiences in Management. In addition, the Counseling experience would constitute an excellent Management "case." The presentation of this case could contribute materially to the Company's "image" among its several publics.
5. The Counseling experience has had a pervasive influence on thinking within and outside the Company about the role and function of the supervisor; an adequate review of the activity's development would contribute to a revaluation of concepts.
6. Counseling point of view and methods have had a considerable influence on supervisory training; a definitive restatement of the program's aims and accomplishments could aid in the assessment of training efforts and contribute to further approaches with supervisors and others.

A proposed outline of the contents of such a write-up is attached.

Among the current applications stemming from counseling concepts and skills identified by the group were the following:

1. Training Programs

Talking With People
Coaching and the Development of Subordinates

2. Research

Various A. T. & T. Projects
Bell Laboratories College Recruit Study
Western Electric Human Relations Research

It was generally recognized that the interviewing method developed in counseling had provided a powerful tool in all of these activities.

Proposals for possible future steps included:

1. A reconstitution of counseling on a limited basis for re-search in the counseling process. This would serve to keep alive and develop counseling skills which otherwise may atrophy and provide a laboratory for re-examining the assumptions and concepts on which the activity is based.
2. An interviewing program for research purposes with particular attention to supervisors.
3. A research project addressed to the organization of work groups and supervisory relations. The research being conducted at North Carolina Works on human factors in reliability is a big step in this direction.
4. A study of the application of counseling methods in the relatively new Engineering Personnel Units.

The ramifications bearing on the desirability and feasibility of all of these proposals were discussed at length. It was generally

agreed that the first step, if no other, should be that of recording past experience with counseling programs.

The status of records on counseling activity which might be used in connection with the proposed write-up was reviewed with the following results:

Baltimore - Relatively complete records available.

Kearny - Few organizational records retained except those in personal files.

Hawthorne - A large volume (24 file drawers) available covering the entire history of the activity. Includes individual cases, group studies, supervisory studies, interviews of special interest, minutes of meetings, reports to Management, special research projects, personnel records, etc.

Headquarters - Limited organizational files retained.

(No one in attendance was familiar with the state of written records in the Operating Telephone Companies.)

The meeting concluded with these recommendations:

1. These minutes would be prepared and distributed to the conferees.
2. A proposal for writing up the counseling experience should be prepared and advanced to the Personnel Director, along with a copy of the minutes.

12.

3. That conferees would give thought and perhaps prepare preliminary drafts covering local experience.
4. That individual conferees might review and discuss locally the other proposed steps and applications.

PERSONNEL COUNSELING IN THE WESTERN ELECTRIC COMPANY

1936 - 1956

I. Concepts and Background

1. What the Company was like
2. How the program started
3. Influence of "Management and the Worker"
4. Initial goals and concepts

II. Operations of the Plan

1. How the plan was organized
2. Selection and training of counselors
3. Extent of counseling
4. Supervision of counselors
5. Reporting results of counseling activity
6. How the counselor related to supervisors, employees and union representatives
7. Obtaining cooperation of employees and supervisors
8. Presentation of counseling to supervisors, Management and unions
9. Reception of counseling by Management, supervisors and union

III. Developments in Methods and Concepts

1. Spread of counseling
 - Hawthorne Satellites, Lincoln, St. Paul, Duluth
 - Other Company locations - Kearny, Baltimore and Headquarters
 - Bell System companies - Chesapeake and Potomac of Washington, ~~Indiana Bell~~, Canadian Bell, Ohio Bell
2. Later goals of counseling
3. Outside interest in counseling
4. Changing relations with Management
5. Diversity of ~~approaches~~ *view points*
6. Experiments in feedback techniques

IV. Values in the Program

1. Actual use made by employees, supervisors and union representatives
2. Effects on Management thinking about employees
3. Effects on Management thinking about supervisors
4. Effects on Management thinking about supervisory training.
5. *Effects on interviewing concepts & techniques*
Rogers
Prog. Counseling.

V. Problems of the Counseling Organization

1. Supervision of counselors
2. Communication of results
3. Selling the program
4. Evaluation of counseling activity
5. Integrating with a larger Company structure

VI. What Happened to the Counselors?

1. Attrition
2. Declining need with changing times
3. Cost squeeze
4. *Effects on the counselors.*

VII. Approximate Evaluation

1. What employees said
2. What supervisors said
3. Counselors' analyses
4. Line organization reactions
- 4a1 Top Mgt Reaction
5. Content analyses
6. Examination of actual use made by employees and supervisors
7. Effects on Management training
8. Effects on people counseled
 - Production - Turnover - Attendance - Complaints and grievances
9. Effects on supervisory relationships
10. Effects on communications within organizations participating
11. Effects on the informal organization

VIII. Ultimate Evaluation

1. What did counseling do for the Company?
2. Effect on current policies

IX. Summary and Conclusions

PERSONNEL COUNSELING IN THE WESTERN ELECTRIC COMPANY

1936 - 1956

Reasons for Undertaking Re-examination of Counseling Experience

1. Public Relations - defensive (correcting the record)
2. Public Relations - obligation to industry, intellectual and professional counseling community.
3. Understanding of present position regarding:
 - Supervisory functions
 - Supervisory training
4. Examination of remaining counseling problems
5. Examination of training potential of counseling
 - a)- What did counselors learn?
 - b)- What counseling techniques should be incorporated into contemporary Management and supervisory training programs, especially for investigative, diagnostic and improvement specialists?
6. Counseling as a case for Management decision
7. Influence on individual for taking his maximum place in the enterprise
8. Needs to be done soon or it can't be done
 - Records get lost or misplaced and lose import with passage of time.
 - Only a few people remain with intimate daily experience with with program throughout its entire course. Much of what needs to be said is in the heads of these people.

PERSONNEL COUNSELING IN THE WESTERN ELECTRIC COMPANY

1936 - 1956

Topics to be Included in Comprehensive Description of this Activity

1. How counseling started
 - Review of research
 - Current Management problems which stimulated experimental effort
2. Initial goals of and for counseling
 - Later developments
3. Selection and training
4. Organization of activity
5. Spread of counseling
6. Relation of counseling activity to Management
7. Actual use made of counseling
8. Counseling methodology
9. Evaluation of counseling
10. What happened to counselors?
11. Attrition and efforts to adapt to new conditions
12. Communication to Management
13. Supervision of counselors
14. Presentation of counseling to employees
15. Employees, Management and unions
16. Effects on Management thinking about employee relations
17. Effects on Management thinking about the role of supervisors
18. Effects on Management thinking regarding supervisory training
19. Diversity of approaches to counseling
20. Effects on persons counseled
 - Supervisory relations
 - Communications within Management
 - Position in informal group

MISSING

