

Advance one, retreat two: A case for problem-based inquiry

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ABSTRACT

Several months after he had initiated and executed a very successful executive retreat on diversity in the research-based organization, Psytech, John Doe, Director of Personnel, received a memorandum signed by the Vice President of Sales. The memo strongly suggested that discrimination based on ethnicity had informed the housing assignments made for the retreat. The memo also strongly implied that this memorandum had been endorsed at an executive meeting by the whole Executive Committee, composed of corporate and branch vice presidents of the organization. Moreover, the memo had been copied to all members of the Board of Trustees, and to other powerful people in the organization.

Deeply distressed by the communication, John was further rattled by an alarmed telephone call from his boss, the Vice President of Human Resources, Dan Bennett. Dan, in Europe on business, had received a copy of the memo from his administrative assistant and demanded to know John's strategy for dealing with this distressing development. It was clear to John that his first task was to reassure Dan that he was on top of the situation and had a good plan for addressing the accusation. Following that, he faced a raft of decisions, beginning with an investigation of the events that might have led to this memorandum, and ending with a strategy for redirecting his successful retreat toward its goal: improving diversity at Psytech through recruitment, training, advancement, turnover control, and the spurring of innovative initiatives to increase the pipeline of minorities and women in the engineering and science fields from which Psytech drew.

Keywords: diversity, employment discrimination, housing discrimination, problem solving, persuasion and influence, management communication

INTRODUCTION

Unlocking his office door was annoyingly difficult with the new key. It didn't fit as seamlessly as the one the parking valet had left in the ignition when his 280Z had been temporarily stolen and taken for a joy ride last week. He had winced when the parking valet careened off toward the rooftop lot of the conference hotel in the sleek, old silver beauty. Innocently, John comforted himself that parking valet's assault would be the worst his prize possession would suffer in the guarded lot while he attended the sexual harassment law conference in Reno. Conservative in his life style, John's one real indulgence was the preservation and preening of that forty-year old sports car. At the end of the conference, the car was nowhere to be found. After heated discussions with hotel management, a report to a bored police officer, and a tedious bus ride back to the Bay Area, he had picked up his voice messages in his bachelor apartment. The car had been found, abandoned on the street. Missing its radio and CD player, and suffering from a severely dented bumper and a missing fender, the hotel's insurance agent thought the car was a total loss. Their offer of compensation: \$1500. Blue Book value. Although he listened politely, the insurance agent was unmoved by John's descriptions of fortunes lavished on the classic car over the years to preserve and upgrade. In the end, John retraced the route back to Reno on another bus, and drove the spoiled old beauty home.

Now, back in his office on Monday morning, the resistance of the lock to the new key brought a fresh wave of anger. Anxious to bring his emotions under control and get to the work that had stacked up in his week-long absence, John hung his well-pressed sports jacket on its back-of-the-door hanger. Even in the casual atmosphere of a California-based scientific research organization, John always wore business dress. As Director of Personnel for the Psytech Company, he was the "go-to" guy for executives company-wide who were bewildered and often frustrated by issues ranging from visa requirements for foreign nationals they wished to hire to how sexual harassment law might apply to a rumored affair between a director and a research assistant. Among his titles was "Director of Diversity," involving a set of duties not so long ago collected under the title, "Affirmative Action Officer." Not always a bearer of welcome news to the higher echelons of Psytech, John particularly wanted to look professional. He loosened his tie just a little, and sat at his desk, his toe automatically prying open the bottom file drawer, and propped his feet on the drawer's edge as he began to sort his mail.

THE MEMORANDUM

Sorting through some publishing circulars and *pro forma* announcements, his attention was drawn to a memorandum from Vice President of Sales, Joseph Smith. Although he didn't always welcome communication from the bluff and hearty sales executive, John approached this one with some eagerness. He had been expecting some message of congratulations from the Vice Presidents on his successful diversity retreat. Two months earlier, John had conceived and coordinated an organization-wide retreat to consider the value of employee diversity to Psytech and means by which greater diversification of the workforce could be achieved. Alert to the law of persuasion, he had worked hard to emphasize the benefits of diverse recruitment, hiring, training, and promotion. And the response had been gratifying. Although, nearly two months after the event, he hadn't yet received the hoped-for complimentary follow-up message from Joe and the other Vice Presidents that he had received in various formats from other executive and managerial staff on the success of the groundbreaking retreat

Except for the “town meetings” the President occasionally convened to discuss a new initiative or a difficult decision, organization-wide retreats from everyday business to consider a policy issue or problem had never occurred at Psytech. Heretofore, retreats had been held within divisions, and usually within units with shared responsibilities in the company. This retreat had been horizontally organized, including all six divisions. Perhaps even more remarkably, representation had cut through the hierarchy. The president, all members his executive committee (divisional VP’s and their executive assistants), and even the chairman of the board, had attended. All attendees had participated in workshops and presentations along with unit managers, selected members of their staffs, and professional employees, mostly researchers. In all, about forty people had attended the retreat.

John himself had enjoyed a minor triumph in his career with the company as a result of the successful retreat. On his own initiative, he had engineered this executive retreat for the purpose of launching the development of a five-year plan for increasing the diversity of the company’s workforce, and for successful management of a diverse workforce. He felt pleased with himself, and proud of his staff for several reasons. First, he had initiated and implemented the first such retreat in company history. Second, the retreat by any measure had been a resounding success. John’s preparation, in accordance with his usual meticulous attention to detail, had been extensive and careful. Presentations on the various aspects of the diversity issue at Psytech were made on the first day by carefully selected, well-respected members of Psytech’s professional staff. The presentations and workshops were stimulating and incisive. The second day had been devoted to meetings in which consensus was sought and reached on general direction for change in policy, organization, and practice to achieve articulated goals for increasing and managing diversity. Finally, an outline of a five-year plan was blocked out, with a mandate to John to flesh out the plan and bring it to the vice presidents for review and action within six months.

Nor had he retreat been all work. The location, Asilomar Conference Center, was a beautiful place, located on the Pacific Ocean, and John’s staff had outdone themselves in planning meals and social gatherings for the evenings. By the close of the second full day, John had felt very good about his achievement. His sense of the retreat’s success had been validated by the positive comments of attendees as they took their leave.

John had been particularly pleased by the way comments suggested that participants had embraced this novel activity and how seriously they had taken the topic. In general, Psytech folk were tolerant, open people and wanted to do the right thing. Beyond that, however, most of these scientific and technical professionals had come to see through the retreat, the interest of the organization and their own careers in an active encouragement of diversity-based training and hiring. The population of California had already tilted to a replacement of the majority population by Latinos, and women had become the majority population in colleges and universities. If interest and opportunity in their fields for these newly dominating populations were not encouraged, the source of new talent in scientific and technological research and development would be inadequate. This perspective lent credibility to what otherwise might have been dismissed as administrative usurpation of the relatively autonomous role of professional staff in identifying and recruiting employees. So, they had accepted the purpose and value of the retreat and had worked to make it productive. Joe had seemed to enjoy the week also. Granted, his interests were not the same; internal issues of workforce development and research activities were on the periphery of his concerns with the comfort and satisfaction of current and prospective customers with Psytech’s products and services. But he was a bright and amiable fellow, and had apparently tried to bring his unit’s perspective to the conversation.

John settled more deeply into his chair as he began to unfold the memo signed by Joe, wondering idly when the last time had been that he had received a “hard copy” version of an internal message. Email had certainly taken over whatever communication needed to be more formally transmitted than a face-to-face or telephone chat would accomplish. “Paper trail” was the term often associated with these occasional written missives. As he scanned the memo, he noted with satisfaction that the first paragraph was the message he had been expecting: “successful”, “enjoyable”, yes, and a “step toward the goal to which everyone subscribed.” But, as his eyes moved to the second paragraph, he had to re-read to register its meaning: “. . . roommates for shared rooms were selected entirely (as far as we can determine) on the basis of ethnic group (hispanic with hispanic, black with black)” and “. . . the Senior Executives and Vice Presidents present were white males, and a significant number of the Managers present were members of minority ethnic groups. Your policy came close to simply stipulating that minorities had to share their rooms while whites did not” and, at last, “. . . in the context of a retreat on the sensitive topic of diversity, your actions seem to us to have been singularly thoughtless.” [Memorandum in Appendix].

On his feet now, a flush rising from inside his collar to his face, John was aghast. Was he really being accused of having used “discriminatory procedures for housing retreat participants in a meeting designed to root out and replace such procedures?” Was the whole Executive Committee – all the divisional vice presidents, really persuaded that such assignment to rooms had in fact occurred, driven by ethnic considerations? Was his success in the eyes of the administration, the Board, and others being contaminated by this accusation? He began to re-read the memo.

BACKGROUND

Psytech is a large scientific research and consulting firm that began as part of a major university and became independent several decades ago. Even though it had become an independent, for-profit firm, however, it had retained many features of academic culture. Those features included a jealously-guarded autonomy of various divisions, shared decision making between professional employees (mostly researchers) and management, and a very conservative approach to change. Most senior managers had come from the ranks of researchers, were physical scientists, and had had relatively little exposure to management theory or practice beyond their own experience at Psytech.

THE DIVERSITY ISSUE

For a number of reasons, including those cited above, workforce diversity was an important issue at Psytech. One indisputable reason was a sense of fairness and social responsibility that characterized senior management and was conveyed to all employees. Another was the location of Psytech in a state and community of wide-ranging ethnic diversity. Yet a third was a concern about the continuing dominance of white males in the physical sciences and the consequent difficulty of recruiting a workforce that reflected the local and state populations. Finally, Psytech management was worried about future availability of technical employees to fill the growing need for skilled support staff for its researchers and consultants. With the relative decrease in the traditional white male population, Psytech was expected to depend increasingly on the interest and vocational preparation of minorities and women to fill these jobs. These sincere

and legitimate concerns co-existed with a strong and traditional standard of achievement for potential Psytech employees.

John began to pace, increasingly flushed with anger and mortification. “It’s just like the 280Z, he thought irrationally. “All the love and care I lavished on that car, demolished at the hands of a reckless young cowboy. . . “ He remembered that he had handed the info about housing for the retreat to his administrative assistant, Tanya, and couldn’t remember whether he had even looked at her arrangements. He stood still, thinking. If he’d been really careful about his beloved car he would have explicitly instructed that heedless parking valet to be sure to apply the telescoping steering wheel lock resting on the floor of the passenger seat before handing it over to him. If I had been in full administrative control of the retreat. . .

In the midst of this dawning *mea culpa*, his direct telephone line rang. He wasn’t surprised to hear the baritone voice of Dan Bennett, his boss and Vice President of Human Resources. Traveling in Europe following a conference in Prague on the H-11 visas, Dan had hoped to identify some recruiting pockets in Eastern Europe, and had been away quite a long time. “John,” Dan boomed in a voice that lost none of its resonance as it moved through the telephone lines from the distant city.. “ I’m looking at a memo Maria faxed me. It’s addressed to you and signed by Joe Smith, and makes some very serious charges. Have you seen it?” Assured by John that he was indeed looking at the document as they spoke, Dan moved directly into his action mode: “How do you plan to handle this hot potato? Do you know what the facts related to the charge are? Are we guilty?” Only able to repeat that he was seeing the accusations for the first time himself, John tried to convey a sense of calm to Dan that he didn’t feel himself. “I’ll have a report to you on the facts along with a plan of action for responding to the memo within a few days.” Dan, slightly mollified, rang off with a demand that he see drafts of any written response John intended to make to Vice President Smith and/or any of the copy holders.

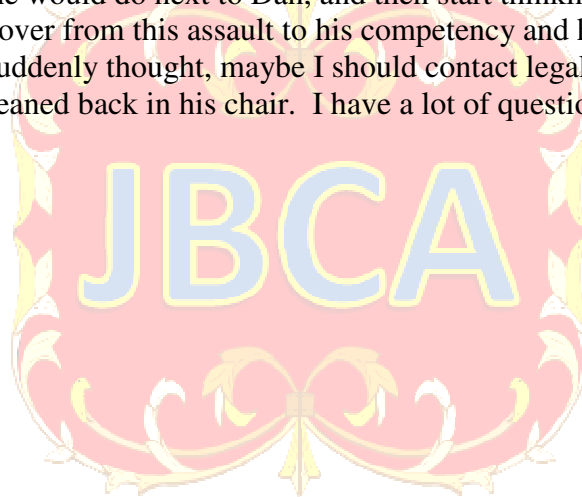
As distressing as the conversation with Dan had been, it at least helped John to focus on some first steps to take in the process ahead of him. He had to determine what the “facts” were in the situation, and to do that, he must begin at the beginning: how had the housing assignments been made ? He picked up the phone to call Tanya Brown, his administrative assistant.

Discoveries

Half an hour later, John was sitting in the conference room with Tanya, retreat materials spread out on the desk. “Well, yes, John,” she answered, looking surprised and a little worried. “I arranged the housing accommodations. As you know, the expectation here is that execs will be assigned to the best of the accommodations available, and since Asilomar gives us a discounted rate, I was able to put them in single rooms in the new wing. I then followed the hierarchy down, and managers shared rooms, mostly in the older section of the hotel, which is still very nice. As you know, our budget wasn’t generous for the retreat, and shared rooms freed some money for nicer meals and spaces.” John held his breath a moment before he asked, “How did you decide who the roommates would be?” Tanya looked more worried as the problem began to take shape in her mind. “I know all the staff pretty well, so I assigned people I knew to be friends to rooms together. . . was that a problem?” “Did you ask people for preferences/” “No, the question wasn’t on the registration form, and it would have been really time consuming to notify everyone to urge them to state preferences. And, as I said, I already knew what those preferences would be. Has someone complained? They knew who their roommates would be before the retreat, and no one complained to me.” John felt a twinge of guilt. He should have seen to it that the housing accommodation preference questions were on the registration form, and he should have gone over the assignments before Tanya sent them out. “Yes, someone has com-

plained, but I'm not sure who, and in any case, if there was a problem, it wasn't your fault. You were doing what you thought best; I dropped the ball. Don't worry about it."

Leaving the conference room with a heavy heart, John returned to his office, sat down, pried open the file drawer, propped up his feet, and began to reflect. He thought again, "it's just like the 280Z. All the love and care I lavished on that car, demolished at the hands of a reckless young cowboy. . ." Again, he remembered that he had handed the information about housing for the retreat to Tanya, and still couldn't remember being concerned about room assignments. He sat very still. He berated himself a second time: if he'd been really careful about his beloved car, he would have explicitly instructed that heedless parking valet to be sure to apply the telescoping steering lock resting on the floor of the passenger seat before he had handed it over. His failure to make sure the parking valet put the steering wheel lock on his 280Z had cost him a lot of time and a lot of money, and his car was still limping around waiting for the classic car mechanic to find a suitable new bumper. What would this new failure to pay attention cost him. Not his job, probably, although he couldn't be absolutely sure. Certainly though, his credibility had taken a hit, and maybe a leak in the enthusiasm the Retreat had built for creating the Five-Year-Plan. He slammed his feet back onto the floor, and turned to his computer, thinking he had to send a notion of what he would do next to Dan, and then start thinking through an action plan. It wouldn't be easy to recover from this assault to his competency and his hopes for the outcome of the Retreat. First, he suddenly thought, maybe I should contact legal counsel to help sort out legal vulnerabilities. He leaned back in his chair. I have a lot of questions to ask before I can figure out this problem.



TEACHING NOTE
ADVANCE ONE, RETREAT TWO:
A CASE FOR INQUIRY-BASED PROBLEM SOLVING

TEACHING NOTE

Epilogue

The situation of this case has been little altered from the original one which took place in the San Francisco Bay Area some years ago. The setting has been disguised, however, as, of course, have the names and titles of actors in the case. The memorandum at the center of the case is unchanged except for names and titles. The actual event occurred in a large state university system, and this author was actually the source of the John Doe in the case. The circumstances described here as occurring in a research and development spinoff from a not-for-profit research organization work equally well in the assigned setting, and are relieved of the sometimes tortuous politics of a complex public university system.

The outcome of the actual situation followed a careful process of communication following receipt of the memo that began with telephone calls and face-to-face conversations with various copyholders of the memo in question. Through that process, it was determined that most copyholders were surprised and suspicious about the origin and distribution of such a document, and had questions about whose axes were being ground. Based on that information, a “communication plan” (see Appendix for sample) was drafted to work out a careful process for framing messages to various concerned members of the university population, for tailoring messages to their needs and interests, and for selecting means and media for delivery of messages. Ultimate resolution of the issue came some weeks later when it was addressed in the publication of the proceedings of the retreat. That document observed how revealing it is that something so neutral on its face as housing policy for various ranks of employees in a retreat could bring into sharp relief the clustering of majority male population at the top of the hierarchy and clustering of employees of different ethnicities at lower ranks. That observation was accompanied by an expression of regret that it was so, and a hope and a determination that the new diversity effort would bring positive change. No further word was forthcoming from any sector on the topic, nor did there appear to be negative ramifications as the Five Year Plan was developed and implemented.

Case Synopsis

Several months after he had initiated and executed a very successful executive retreat on diversity in the research-based organization, Psytech, where he was Manager of Personnel, John Doe received a shocking memorandum. Signed by a vice president of the organization the memo strongly suggested that discrimination on the basis of ethnicity had been at work in the housing assignments made for the retreat. The memo also strongly implied that the letter, signed by the Vice President of Sales, had been endorsed at an executive meeting by the whole Executive Committee, composed of corporate and branch vice presidents of the organization. Moreover, the memo had been copied to all members of the Board of Trustees, and to other powerful people in the organization.

John was deeply distressed by the communication, and his distress was intensified by a rattled telephone call from his boss, the Vice President of Human Resources, Dan Bennett. Dan, who was in Europe on business, had received a copy of the memo from his administrative assis-

tant and demanded to know from John what he was going to do about this distressing development. It was clear to John that his first task was to reassure Dan that he was on top of the situation and had a good plan for addressing the accusation. Following that, he faced a raft of decisions, beginning with an investigation of the events that might have led to this memorandum, and ending with a strategy for putting his successful retreat back on the road to its goal: improving diversity at Psytech through recruitment, training, advancement, turnover control, and the spurring of innovative initiatives to increase the pipeline of minorities and women in the engineering and science fields from which Psytech drew.

Learning Objectives

The primary learning objectives in this case are

1. To teach inquiry-based problem solving as part of an effort to advance inquiry-based education in management studies
2. To teach divergent and convergent thinking as means for introducing wide capture of ideas, information, and approaches (divergent thinking) in a process of problem identification; and consolidating and directing useful ideas and information (convergent thinking) in a rational process toward problem solution.
3. To help students to deepen their powers of analysis
4. To teach the value of “close reading” of documents, and close reading techniques

In experiences in teaching this case, both to graduate and undergraduate students of business in Communication and Organizational Behavior courses, we have found the most frequent response to the case is to assume without question that the accusations are true, and that the problem can only be “solved” by a *mea culpa* followed by an apology, and finally, a plan to ensure that such a thing never happens again.

In fact, that response is the least fruitful approach to the case, for it is certainly a reach to assume

- (a) the accusation is correct and ethnicity had been used as a criterion in housing assignments for the retreat, and
- (b) the memo truly represents the views of all members of the Executive Committee and that they were all co-signatories to the memo even though it was signed only by VP Smith, Nothing in the language of the memo ever claims the communication to be official or unanimous. And, of course, Vice President Bennett’s ignorance of it cast a very doubtful light on the source..
- (c) copyholders are universally outraged by the accusatory memorandum

Problem Identification and Inquiry

The first step, then, is problem identification which must occur before problem solving can begin. Students should come to a realization that the nature of the problem is unclear, and therefore they should hesitate before beginning a campaign to explain, justify, and beg forgiveness for having done that of which John Doe is accused. A process of inquiry should be undertaken, and students should be helped to use divergent thinking as they scrutinize every aspect of the communication, from the language by which Vice President Smith describes the origin of the memorandum to the very unusual inclusion of copyholders designated by the memo. Students, once enjoined to follow a process of “close reading”, to read carefully and to critically consider word choices, references, tone, point of view, will usually become quickly involved in the analysis based on that more attentive reading. Their next step will be to figure out how to develop questions that will help to clarify the communication, whom to question, what channels of communication should be used to seek answers to the questions, and how to frame the questions for different audiences (copyholders). Framing will include choice of language, tone, point of view, and so on.

Once the problem is satisfactorily identified, students will be expected to

- Draft an immediate response to Vice President Dan Bennett to reduce his anxiety and manage his expectations for a problem solution
- Design a strategy for responding to all stakeholders identified in the memo and for staging an inquiry process to learn their reactions to the memo
- Design a Communication Plan that includes all stakeholders or target audiences, the message that will go to each stakeholder or group of stakeholders, the means by which the message will be conveyed and by whom, the desired outcome for each message, and appropriate timelines for accomplishing the plan. (Sample Communication Plan attached)
- Decide on final communication strategy that will minimize negative effects of the memorandum and allow development and ultimate acceptance of the Five Year Diversity Plan to move ahead unimpeded.

All these steps can be realized through individual or group work, through class discussion, written assignments, role playing, (telephone and face-to-face interviews, for example) and various other pedagogical techniques. Probably the two essential elements of working through this case are techniques to encourage and sustain divergent thinking, i.e., creative thinking about motivation for the memo and possibilities for response, as they pursue the inquiry process, and to learn how to develop and use a communication plan for inquiry and resolution.

Disciplinary Appropriateness for the Case

This case is designed to be used as a tool in a variety of disciplines – organizational behavior, management communication, and human resources particularly. It could also have value in strategy courses. It is appropriate for both undergraduate and graduate classes.

Suggested Discussion Questions

1. Once having read the memo in question, and perhaps having discussed it with some trusted colleagues and/or staff members, what questions should John articulate about the document, its meaning, its motivation, and who might or might not have been involved in

- its conception and drafting. Should he pose these questions and seek a full discussion with his boss, Dan Bennett, about the situation?
2. What new insights can you furnish John from repeated close readings of the document? What does the memo actually claim, and what does it not say? Are there significant silences in the document that allow it to slide over such issues as actual authorship and endorsement, level of knowledge the author has about the situation, and so on.
 3. What protocols have been violated in the transmission of this memo? Why was John its primary recipient rather than Dan whose place in the organizational hierarchy is parallel to writer, Joseph Smith? Why did copyholders include members of the Board and other powerful and influential people in the organization? Is that usual for a document of this nature?
 4. What would be the most desirable outcome of the strategy you choose to employ to handle this situation? Do you want a major policy review of housing arrangements in the organization's events? Do you want a public investigation of the process your department used in making housing arrangements? Should you send a formal letter to each of the copyholders or is there another form of communication you might use? How public do you want this follow up to be? What are the advantages and disadvantages of the more public as opposed to the discreet follow up?
 5. As you draft your communication plan, does a rational decision or a unifying strategy emerge (convergent thinking) that will determine the message for each targeted audience and the delivery method for each, and can that strategy increase the likelihood that you will achieve similar desirable outcomes for each?
 6. Are there management lessons in this situation? Should John have handled the details of the planning of this important event differently? If so, how? What are the relationship issues? Should John have been aware of discomfort with the retreat VP Smith might have felt? If so, what could he or should he have done about it?

Example of Possible Answers and/or Further Inquiries to Discussion Questions

1. Should I assume that discrimination on the basis of ethnicity was used because we are accused on the basis of *prima facie* evidence cited by someone whose motives are unclear?
2. Does Joseph Smith represent the Executive Committee, or is he acting on his own volition?
3. Why did Dan Bennett, a member of the Executive Committee know nothing about the memo before it came to him from his AA?
4. Is it usual for an internal problem – or theoretical problem – be brought to the attention of the author of that “problem” through a written document? And if so, what is the probability and what are the implications of making the problem “public” by copying Board members

In general, John's response should be to formulate questions, and on the basis of their possible answers, design an investigation to learn whether the accusation is accurate, and if so, why it happened, and then to think strategically about how to handle the situation. Students should be guided to that realization and to see the initial confessional and apologetic response is possibly inappropriate.

APPENDIX

- I. Glossary
- II. Memorandum from Joseph Smith to John Doe signed by Joseph Smith
- III. Memorandum from John Doe to Tanya Brown directing her to make housing arrangements for retreat
- IV. Invoice for housing from Asilomar Center to Psytech
- V. Table of Organization for Psytech featuring Human Resources and Personnel
- VI. Communication Plan Models

GLOSSARY

Close Reading: Paying especially close attention to the nuances and connotations of the written word. This sensitivity includes attention to word choices, sentence construction, imagery, and other linguistic elements that reveal a point of view or world view, variable meanings of words, indications of social or cultural assumptions, tone, style, and other features that contribute to a full understanding and interpretation of the text.

Communication Plan: A systematic plan for ensuring that useful and appropriate communication of information, perspectives, understandings, and interpretations is achieved with relevant audiences in a timely manner with desired outcomes. Such plans are usually devised in chart or tables with disparate audiences, messages, deadlines, means for delivering messages, and various desired outcomes. Examples are provided in the Appendix.

Divergent Thinking and Convergent Thinking: Divergent thinking is a means for generating creative ideas by exploring many possible solutions. Considered a significant route to innovation, divergent thinking promotes many ideas and possible solutions in a limited period of time through some relatively unorganized or free-flowing method such as “brainstorming.” Convergent thinking typically follows a pattern of “rational thinking,” using a particular set of logical steps to arrive at one solution supported by the evidence. It is usually seen as a necessary step to follow divergent thinking; ideas and information are organized and structured using convergent thinking.¹

Problem-Solving by Inquiry: As used in this case, it is the process that must precede problem solving. Fundamentally, the inquiry is into the authentic questions generated by the text, followed by opportunities to construct meaning of the text and of the students’ learning. Problem solving by inquiry involves identification of assumptions of the text; use of critical and logical thinking; and consideration of alternative explanations.¹

Rational Problem Solving: Rational thinking is the ability to consider the relevant variables of a situation and to access, organize, and analyze relevant information (e.g., facts, opinions, judgments, and data) to arrive at a sound conclusion. Rational problem solving presumably limits itself to evidence that can be analyzed, allowing solutions based on logic and available evidence.

¹ National Research Council, 1996.

This process is often flawed by "bounded rationality," the limitations on information and evidence available to the problem solver, and by other constraints on the practice of "pure" logic.

MEMORANDUM

TO: JOHN DOE, MANAGER
FROM: JOSEPH SMITH, VICE PRESIDENT
SUBJECT: JANUARY RETREAT
DATE: MARCH 30, 1989

Dear John:

At a recent Executive Meeting, corporate and branch Vice Presidents discussed the successful and enjoyable retreat at Asilomar your office recently organized. "Attaining Diversity in the Corporation" is a goal to which we all subscribe, and the retreat brought us somewhat closer to reaching it.

Comparing notes, however, we were surprised to find that the procedure used by your office for room allocations was apparently this: (1) CEO, Directors of the Board were allocated single rooms in the new luxury wing; (2) Vice Presidents were allocated single rooms in the old wing; (3) Managers and below were allocated shared rooms; (4) roomates for shared rooms were selected entirely (as far as we can determine) on the basis of ethnic group (hispanic with hispanic, black with black).

I have been asked to point out to you how discriminatory this appears in retrospect -- the more so given that all the Senior Executives and Vice Presidents present were white males, and a significant number of the Managers present were members of minority ethnic groups. Your policy came close to simply stipulating that minorities had to share their rooms while whites did not.

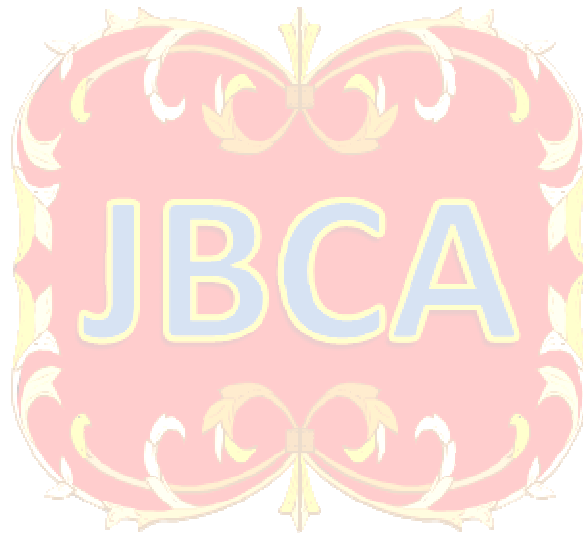
Under any circumstances, the accomodations policy you appear to have used would have been inegalitarian: you should have at least asked us what arrangements we would prefer. But in the context of a retreat on the sensitive topic of diversity, your actions seem to us to have been singularly thoughtless.

We hope that if you ever organize other such events you will accord to all participants the right to choose their accomodations and roommates, and not impose criteria of your own devising that seem to stress status and ethnicity over colleagueship.

cc: L. Grey VanDamme, Chairman of the Board
P. Whitney Elliot, President
Cabinet Members
Management Committee

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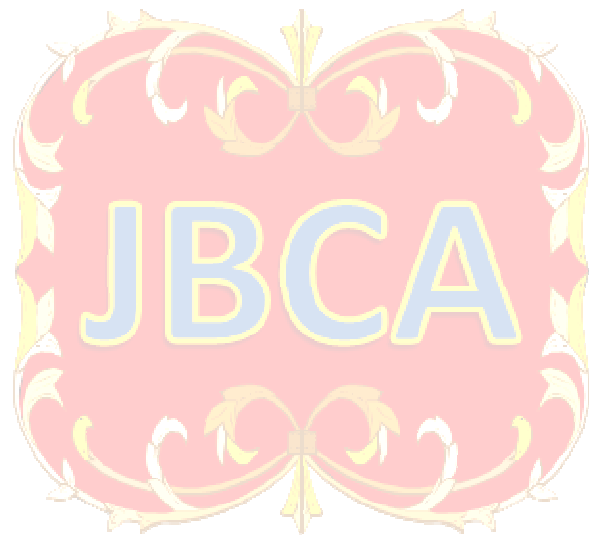
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ELEMENTS OF A COMMUNICATION PLAN

- [1] Analysis of Problem/Opportunity**
- [2] Establishment of Overriding Goals/Objectives**
- [3] Development of General Strategies**
- [4] Development of Specific Steps:**
 - (a) Audiences**
 - (b) Message(s)**
 - (c) Objective(s)**
 - (d) Method(s)**
 - (e) Responsibility**
 - (f) Timeframe**
- [5] Evaluation of Results**





MODEL COMMUNICATION PLAN ANNOUNCEMENT OF NEW FACILITY

Problem/Opportunity:

Decisions to build or lease new facilities – or significantly expand existing ones – present opportunities for positive communication to our members (improved service/convenience), our employees and physicians (responding to membership growth/promotional opportunities), and the general public (enhancing our marketing). It also can present either opportunities or problems with the affected communities, depending upon attitudes towards growth/no growth and the degree of city/county/state approvals required.

Overriding Goals:

- [1] Assure premature announcements do not jeopardize internal and external approval processes.
- [2] Assure announcements do not jeopardize property acquisition/lease negotiations, or prejudice other facility planning/development options.
- [3] Minimize interim damage to existing contracts/referral arrangements with existing providers whose livelihood will be affected in longterm, by assuring they learn of decision from us and providing opportunity for discussion, possible renegotiation if feasible.
- [4] Assure consistency of message to all audiences by all local/regional/national spokespersons.
- [5] Coordinate disclosure of plans so most affected audiences (local staff and local civic leaders) learn of plans directly from Kaiser Permanente and not in the news media.
- [6] Maximize positive communication for internal morale and external marketing.

General Strategies:

- [1] Facilities Planning Committee to inform Public Affairs of recommendations for new facility acquisitions/leases before submission to Drs. Sams/Lawrence for approval.
- [2] Public Affairs to develop a coordinated Communication Plan following attached model, identifying specific "trigger events" (i.e., formal internal approvals, public filings) which would implement the Communication Plan and establish timing for announcements.
- [3] Facilities Planning Committee, top management, and affected medical center management to approve Communication Plan as part of facility approval process.

MEMORANDUM

TO: Tanya Brown
FROM: John Doe
SUBJECT: Housing and Meals Budget for Retreat
DATE: November 13, 19__

The budget for housing and meals for the retreat in Asilomar in January is \$5000. Please make room arrangements accordingly. The total count of participants is forty (40)

John

Asilomar Center Lodging Rates

▲ Beachfront Luxury Wing

- Single occupancy \$110
- ◆ Fabulous ocean views, exceptional suites

▲ Seafoam Wing

- Single occupancy \$75
- Double occupancy \$45
- ◆ Courtyard views, beautifully decorated rooms

We also have many fine meeting rooms available.
All rates are per night, not including taxes.

140

