

OFFERING AND USING CONSULTANT SERVICES

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It is a great pleasure to be here this morning and to speak with you and to see many friends and colleagues that it is a pleasure to see from time to time at various meetings. The topic for consideration this morning is one which is near and dear to me not only because I've been wearing this particular hat for some time, but somehow I've managed to get acquainted with a number of people who represent our own very select and perhaps peculiar field of language laboratories, but also in other far-ranging fields such as engineering, architecture, publishing, and so on. Trying as I do occasionally to size up this unusual piece of headgear brings to my mind the definition of an expert. An expert is a man from out of town. Applying this reasoning to my situation here in Portland it would seem to follow that the distance out of town bears some kind of direct relationship to the degree of expertise. And so coming all the way out here I'm feeling quite expert. But I'm digressing.

The subject of our session here is "Offering and Using Consultant Services", and limitations of our time this morning will make it necessary to deal with it rather generally and cursorily. Accordingly we'll attempt to consider rather quickly the following: first and foremost in this presentation, what are the major distinct steps in the typical or average consulting job, if there is such a thing. Anyone who has engaged in this will know that what we happen to do in a given job or in dealing with a given institution is anything but routine. Nevertheless there are certain common steps that seem to characterize the consulting process. I want to go over these and try to point out, as we consider them, some of the considerations and implications for each step. Using the factors involved in the process as a frame of reference, we'll try to consider briefly the job and the likely impact on the expectations of various people from an institution seeking help in planning a laboratory, and at the same time some of the most important qualifications for the consultant. As far as the major steps in the process are concerned, it should be realized that there will be cases where not all of the steps will be followed. This, however, is unfortunate because the nature of the process is such that if any of the steps are left out, it can cause real problems. These are problems for the consultant. On the other hand they are not nearly so significant for him as they

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are for the institution which has to get the laboratory and has to live with it.

The first step, and in one sense the most important, in the consulting process involve two parts. It is a meeting or perhaps a series of meetings between the consultant and the representative of the institution. But preceding this in ideal circumstances we would have a meeting or series of meetings between the administrators, on the one hand, and the language people, the educators at the given institution.

This is something which the consultant is not in a position to do except in certain rare cases where he is contacted way ahead of time and asked for advice about the process as well as to help with the laboratory. He is not able to recommend these preliminary meetings but they are in a great way the key to acquiring a laboratory which is going to realize the hopes of the institution which we will discuss shortly. At this meeting the instructional program of the given institution will be discussed in detail. Instructional programs have common elements, but at the same time they are all definitely individual and unique because we're all individual. This point is something which plays a constant and very important role and something the consultant should keep in mind. It's very important that both the administration and the faculty should be involved in these meetings. It would be very desirable to have this dialogue between the administration and the faculty before the consultant is finally called in. But at any rate, if that has not been the case, the one should be urged and the consultant should encourage, if he can a meeting with both parties. I've seen the case where they meet separately with the administration and the institution more efficiently if he doesn't have to be in the middle. It makes it a lot easier for the consultant actually to be able to help the faculty and where they may not be speaking the same language. to resolve any tensions that exist. What are the things that are discussed at this meeting or series of meetings as the case may be? Naturally, as one would assume, one discusses the basic types of laboratories; that is, whether the system is to be conventional record, remote student-record, an audio active laboratory, an electronic classroom, or combination of these. It is very important to discuss the instructional program in such a way as to have some idea of why a particular equipment is to be chosen. Another situation that a consultant gets into frequently is that either the faculty or the administration are hot after some kind of non-standard laboratory. They want something which is not the usual kind of laboratory. This is a problem which is very difficult to generalize. I think we will try to come back and look at this after we have considered the other factors.

Along with the basic type of laboratory—keeping the instructional program in mind—we consider such things as enrollment, location,

the number of positions, the type and location of the console, whether this is to be put in a new building, or whether existing facilities will be adopted. This all has a great deal to say about how much time the consultant is going to need. If it is a new building and they have to work with architects, then there are going to be many more meetings, and the institution must be given some idea of this from the outset. Then, of course, one of the most important considerations, is the range of the budget. It has happened that a great deal of time has been spent discussing and even specifically planning a sophisticated and expensive installation only to find there are not enough funds available for this kind of laboratory and the institution is going to have to settle for something more modest. Here again, this points up to the importance of initial meetings.

In speaking of the budget one of the very great services which the consultant can and should provide, is that the purchase price on a new laboratory is not the extent of the investment. It is very common that many administrators are willing to spend money, and in very considerable amounts for a nice, shining, new, equipment-installation, and then they are absolutely aghast at the thought that it is going to take a regular budget from year to year to operate. The consultant must delineate the cost of maintaining the lab over a period of years.

There are other details which must be discussed at the meetings with the faculty. The type of console to be used, the number of additional program sources, special provisions such as remote self-start of student machines, a loudspeaker system for the classroom, testing devices, and so on. This brings us to the second important step! The development of the specifications for the laboratory. We should be able to supply enough information so that he can write a complete specification. This is one of the primary objectives of the meeting. Sometimes it is possible to have just one meeting, sometimes you can go right ahead and write the specifications. Also, it takes a great deal of time and you will have to work hard to discern all the details needed to develop a satisfactory set of specifications.

The specifications, then, should contain an enumeration of the function of the laboratory and hopefully a detailed breakdown of the functions of the various parts of the laboratory, modern frustration or disappointment among all of the parts involved. It's a challenge to the consultant to try to keep everyone as happy as possible and to keep the process flowing as smoothly as possible. One of the main means to do this is through specifications. It has always been my philosophy that specifications should be written independently; that is, the consultant should not simply take manufacturer's specifications and adapt them, rather he should develop his own method and formulate specifications which emphasize two things: the control function

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of the laboratory, broken down into as much detail as is necessary. The other side of the coin is the technical side. Thus, the specifications should be written in such a way as to give enough technical information to guarantee the basic quality of the equipment and to guarantee that the equipment installed performs to the standards specified and is durable within the bounds of price, class, and intended application. This is a challenge which never ceases. I feel that I've been able to improve upon specifications and at the same time I am very aware that there is much room for improvement.

The specifications should not limit (more than necessary) the competition. Nor should they be written in such a way that the buyer or the institution ends up paying a premium for the installation that he might have gotten for much less. The consultant should furnish a billhead which encourages the addition of other bidder's name; if the latter have not contacted the school. The consultant can provide a well processed bid list. Once the specifications have been written, they are handed over to the institution's purchasing agent for the accomplishment of the bidding process. If the school does the reproduction of the specifications—that is—if you hand them one type-written copy and they are to type the finished copy then the consultant must be sure to proofread it carefully and to guard very carefully against the typist's errors. I have found that it is safest to do the whole process myself and to present a sufficient number of copies of the specifications so that the school can send them directly to bidders. This process ends up saving time even though it makes a little bit more work for the consultant.

A part of this process includes meeting with the purchasing agent to make sure that the particular institution's purchasing requirements are clearly representative. Very often these schools have certain standards, as is the case in Indiana, specify a set of "general ingredients" that are used with all contracts for the purchase and installation of equipment. This brings us to the third important step, then, which comes later, usually a month to six weeks, to give the institution time to advertise for bids, to send out the contract specifications, to receive the bids and evaluate them, and then to plan for a meeting. First, the evaluation of the bid recommendations concerning the rule of contract are discussed. This, in my opinion, would best be done by a meeting that includes the faculty, the purchasing agents, the administrators and the consultants. A consultant needs to understand this public meeting process and the institution's point of view when it comes to the expected bid. Many states qualify this happily by setting a limit and then bidding.

Then the consultant must thoroughly analyze the bids and be prepared to explain all the points of his analysis to the institution. We have found that it is very helpful to use a certain rather rigidly

structured kind of bid form as a part of the specifications. This can actually save a great deal of writing of details elsewhere in the specifications and it actually performs a great service both to the bidder and to the institution: it tends to make the bidding process much clearer and much faster. It is more convenient for the bidder to fill out and more convenient for the consultant to interpret. An important point here is stretching and that proves two things; that the various bidders furnish the real manufacturer and model number of the equipment they propose and not their own lab company's number which means nothing. It is impossible to interpret a specification if all you get, for example, is RCA's stock numbers and so on down the line through fifty items. You need to know what specific equipment they are offering. The consultant should try to know what all these models are, but they change quickly. When evaluating a bid one needs to be sure that the complete descriptive literature is available including the actual manufacturer and model. It is very interesting to see what the bidders will try to spread in place upon the institution on this standpoint. The next step then, is the awarding of the contract. I'd like to say that the consultant has to be very careful here. Many times the schools will want the consultant to simply hold its hand and choose a bid. I have always tried very carefully to avoid this. I have tried never to use the statement: "You buy this one" or "You ought to buy this one". What I do is to explain the bids as completely as possible and to say, "This bid in my opinion adheres most completely to the specifications."

The fourth step, is the supervision of the actual installation as it is being carried out. This may be simple, it may be that a very minimum is necessary, but it is extremely desirable for the consultant to pay a visit to the installation site at the time that the equipment is being put in, because there is many a slip between the contracting and the installation. An important service a consultant can provide is to see that the specifications have been interpreted properly and that the equipment is moving in where it should and that the right equipment is going in and so on. There have been cases where laboratory equipment was processed in a manner completely inconsistent with the intentions of the specifications and had to be torn out and rebuilt.

The fifth step is a careful and complete checkout of the completed installation. One must ascertain that all equipment has been furnished, that the installation has been carried out in a thorough and professional manner, and that the laboratory provides the functions and the audio qualities that have been required by the specifications. Now, there are all kinds of complications that can come up, naturally, at this point, but the only thing we can tell the consultant to do is to adhere to the original specifications and refer to them constantly. And sometimes he has to refer to them in his explanations both to the

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contractor and to the institution. Hopefully by that time there will be a minimum of misunderstanding. Specifications are usually written in such a way, happily, that if something is wrong it is going to be apparent. If something is badly deficient in terms of performance of the equipment there is plenty of leverage for the consultant to go to the contractor and say, "This will not do, you must change this, you must substitute for this piece of equipment, or you must redo this part of the installation." and so on. One must be prepared for the eventuality of having to bring in test equipment and a consulting engineer to prove the fact that equipment does not meet the specifications. However, usually if your audio specifications are average, and are carefully written it is readily apparent that the equipment is seriously deficient. But the threat of putting in new equipment if it's necessary is often sufficient to get the action which is required in the contract.

This brings us to the final step which may or may not be part of the requirement, but which, in my opinion, can be very helpful, and that is the consultant providing the faculty orientation in the uses of the laboratory.

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The institution's expectations and the consultant's competencies. What the institution is after is a good laboratory and one that is going to be working satisfactorily. The extent to which this is possible depends a great deal on the institution as well as on the consultant. This is one thing which is often neglected and which often results in the consultant feeling that he is not appreciated. It behooves the consultant to be very careful about pushing the institution into decisions which they have not made themselves.

There are a number of steps that the school can take to insure their own satisfaction. They should be careful in examining their consultant's credentials and I would hope that more and more they would be making use of the consultant registry of the National Association of Language Laboratory Directors. Agreement on principles such as modifications in the light of the consultation and careful dialogue between administration and faculty are the most important things that they can do to insure a good laboratory. Their own management and business methods often come into play; their own objectivity in overrating or showing favoritism to a certain salesman. The institution can plan the consultant's time seeing that he spends enough time meeting with the people involved and does not waste time.

As we have implied in going through these steps, a great deal of competencies are desirable for the consultant. How a consultant gets started in his practice is without question; usually it's planned in an historic sense. Most of us who are doing this kind of work prob-

ably were lab directors having to plan bigger and new laboratories at our own institutions. Perhaps one also teaches a course in laboratory and others begin to hear and appreciate his efforts. The consultant needs a considerable amount of competence in two areas. The first of these is pedagogical. He needs a background in language learning and in language teaching. There is no substitute for this: if it comes to choice I would much rather see a person with some technical limitations but with a thorough knowledge of the instructional process trying to help institutions, trying to help others find laboratories, than someone who has a lot of technical background but really does not know the instructional process well at all. On the other hand, the technical competence does come very much into play. The person who begins to work in this area must commit himself to do all he can to improve his technical knowledge: his base, his frame of references, his actual confidence in terms of the equipment involved, can be improved by working with equipment, taking courses at his own or another institution, home study. There is a tremendous literature in this field of electronics today with which he should be acquainted. Membership in professional societies, both pedagogical and the technical, is important and extremely helpful, and should be a part of the credentials, the kit bag, of any confident consultant.

Another requirement of the consultant, one of the most difficult for any of us to handle is that of being reasonably impartial. This impartiality refers to both of these other competencies: first, the consultant should be educationally impartial; he should try to maintain an open mind when it comes to the way of running a laboratory and when it comes to the quest on the types of installations which can do the job. He should be able to sympathetically and directly look at a school's real situation and to see what is best for them and subjugating his prejudice as far as the kind of lab is concerned. Secondly, he should be impartial commercially. He should not be involved in any regular tangible way with any of the laboratory manufacturer's; he definitely should stay off the payroll. I must honestly say that one cannot help but be involved with the various companies, the purpose here is to be involved as equally as possible with a number of companies, maybe not all of them, but at least several.

If this is not the case, then very quickly the consultant's effectiveness is nullified; many have been accused of being on the payroll of one company or another when it has never been the case. But it does happen. Finally, one must always say that here is a multitude of personal attributes pertaining to working with people that are extremely important; discretion; maintaining a professional attitude through all aspects of the work; inquisitiveness and at the same time being consistent in matters of speed and expenses.

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A fair honorarium it would seem is \$75. for the above work if it is in-state. Many lab directors do a great deal of consulting for free because the university offers their services and work time free to the public schools of the state. Generally for this type of work one gets out of pocket expenses.

To close, I would like to share with my colleagues the key to professional success in this unique field of language laboratories, it is a set of guidelines which are the boundaries of victory and held by an eminent scientist and the research personality of our century, and are applicable in many disciplines, particularly those of the language laboratory. It is known as Murphy's Laws:

The first of these is really the general rule: in anything of scientific endeavor, anything that can go wrong, will. The second is, left to themselves, things always go from bad to worse. The third is, if there is a possibility of several things going wrong, the one that does go wrong, is the one that will do most damage. The fourth is that nature always sides with Murphy's Law. The last one: if everything seems to be going well, you have obviously overlooked something.

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