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Organizational Research & Consulting, L.L.C.
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Education: Ph.D., Sociology (minors in Statistics and Social Psychology), 1985
Ed.M., Counseling and Human Services, 1976
B.A., Psychology, 1974

Services

- **Organizational Effectiveness**
Needs Assessments
Gap Analyses
Organizational Change
Transition Plans
- **Research and Data Analysis** (Surveys, Focus Groups, Interviews)
Customer and Employee Satisfaction
Benchmarking
Organizational Climate
- **Process Improvement**
Diagnosing Causes
Using Quality Tools
Remediating Causes
Maintaining Gains

Biography (Brief Synopsis)

- Improving organizational and/or individual performance as related to the mission, strategic goals, and mandates of organizations and its programs by facilitating more than 100 meetings involving more than 1,000 attendees, resulting in more efficient meetings and actionable strategic plans.
- Directing more than 80 research projects and supervising large teams of research analysts.
 - Conducting research, analysis, design, development, and evaluation of more than 20 survey projects involving more than 400,000 survey respondents. Actions implemented from these research projects resulted in client savings of approximately two million dollars and more effective allocation of funds.
 - Conducting research, analysis, design, development, and evaluation and reports for more than 60 focus groups involving more than 650 participants, resulting in improvements to processes, forms, systems, and survey design to solve real and immediate organizational problems.
- Developing training plans that includes needs assessment of internal and external stakeholders, training approaches and administration, and evaluation.

Selected Clients Including Non-profits

Aircraft Owners and Pilots Association, American Statistical Association, Mountain Laurel Center for the Performing Arts, National Gambling Impact Study Commission, Ernst & Young, LLP, Federal Mediation and Conciliation Services, Department of Health and Human Services' Agency for Health Care Policy and Research, Defense Information Systems Agency, and Internal Revenue Service.

Selected Experience

- Designed, facilitated and instituted a five year strategic plan for one of the largest chapters of the American Society for Training and Development, a nonprofit organization.
- Designed and facilitated the reorganization of a nonprofit community board, Historic Mount Pleasant, including the development of the vision and mission.
- Consulted to diversity team at Williams Learning Network about conducting a diversity survey.
- Conducted a third party review of the National Opinion Research Center's interviews of patrons at gambling casinos for the National Gambling Impact Study Commission, report titled "National Gambling Study Third Party Review of Survey Procedures."
- Facilitated a strategic planning session for Premier Information Technology Services.
- Conducted interviews and secondary data analysis for the Aircraft Owners and Pilots Association's project "Pilot Assistance Hotline Report and Tactical Plan" as a subcontractor to Houck & Associates.
- Designed a moderator's guide and facilitated focus groups for the American Statistical Association about the status of statisticians and accreditation.
- Designed a moderator's guide and facilitated a focus group for the American Statistical Association about membership expectations and suggestions.
- Designed and conducted a Cultural Values Assessment Survey as part of a cultural due diligence process for Carl M Freeman Associates as a subcontractor to Structured Solutions, Inc.
- Analyzed the research practices of the Organizational Process Improvement Office and developed a best practices guidelines booklet as a subcontractor to Structured Solutions, Inc., "DISA/OPIO Survey Assessment and Best Practices Guidelines."
- Subcontracted to the Computer Science Corporation PRIME Alliance's project "IRS e-services Organizational Transition Plan."
- Conducted one-day facilitation on how the role of the project officer fits within the agency's mission and strategic plan for the Department of Health and Human Services' Agency for Health Care Policy and Research.
- Designed and conducted focus groups with businesses filing electronic tax returns for the Internal Revenue Service, produced report "941 TeleFile System Users and Non-Users Focus Group Study."
- Consulted with the Training Director at Federal Mediation and Conciliation Services to develop a comprehensive training evaluation plan.

- Served on the advisory panel for ASTD/Hay research focus group project “Global, Business and Financial Skills for HR Executives: Are These the Critical Skills that Contribute to Organizational Impact.”
- Consulted on training needs assessment for Niklas Data.

MANAGEMENT RESEARCHER

Kaiser Permanente Southern California Region
 Organization Effectiveness Department
 Pasadena, California
 July 1991 - January 1995

- Consulted to top administrative team on the need for and development of new service line to customers, conducted focus groups to prepare “Woodland Hills Medical Center Women’s Wellness Center: A Needs Assessment.”
- Consulted to Cost Allocation Task Force using quality planning principles for designing a new cost allocation system, trained and supervised focus group moderators, project titled “Cost Allocation Program.”
- Consulted to Medication Administration Redesign Task Force (inpatient and outpatient) using Continuous Quality Improvement, system redesign, change management principles, and focus groups with potential savings of more than \$1.0 million, resulting in “Medication Administration System Redesign Project” report.
- Research (focus groups, benchmarking and customer satisfaction input) on different delivery systems for providing supplemental staffing resulted in new system with projected yearly savings of \$710,000.

Certifications:

- *“Group Facilitation-Practice, Practice, Practice” UA Consulting and Training Services, Inc. 16 CEUs*
- *“Planning and Facilitating Successful Meetings” KP Center for Professional Development 6 CEUs*
- *“Continuous Quality Improvement: Team Leader and Facilitator Training” KP Center for Professional Development and the Juran Institute 49 CEUs*
- *“Quality Planning for Team Members” Juran Institute 14 CEUs*
- *“Applying the Principles of a Learning Organization” KP Center for Professional Development 2 CEUs*
- *“Methods of Categorical Data Analysis” The Institute for Professional Education Inc. 1.8 CEUs*

Associations/Affiliations:

American Society for Training and Development

Los Angeles Chapter, 1987-1995

- *President, 1993*
Coordinated the first international conference sponsored by a chapter
Lead and executed a five-year strategic plan
Developed external and internal partnerships
- *President Elect, 1992*
- *Vice President, 1991*
- *Director of Workshops, 1990*
- *Founder of San Fernando Valley Special Division, 1989*
- *Community Services, 1987*

Metropolitan Washington, D.C. Chapter, 1997-present

- *Chair of Succession Planning Committee, 1997-1998*

National ASTD, 1992-present

Historic Mount Pleasant, Inc.

President, 2000-2003

President Elect 1999-2000

American Sociological Association (ASA), 1979 - 1985, 1995-present

- *Elected Representative of the Applied Section of the ASA, 1996-1999*

Society for Applied Sociology, 1994-present

American Association for Public Opinion Research, 1995-present

Washington Evaluators, 1998-2000

Washington Statistical Society, 1997-present

Association for Psychological Type, 1993 - 1994