

project planning and management series

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The Project Planning and Management Series consists of a set of manuals and associated modules presenting practical approaches, tools and techniques for project planning and management. (See list on back cover). A product of the Government of Jamaica/USAID National Planning Project (1976-1980), the series was developed by the Project Development Resource Team (PDRT) of PAMCO for use in "action-training" workshops and reflects extensive experience in training and project development. All present PDRT members are contributing authors and have worked together in writing, revising and publishing the series. Special credits are due to Dr. Merlyn Kettering for design and development of the series; Dr. Bruce Brooks for writing final versions of many modules; Mrs. Marjorie Humphreys for assuming primary editing and production responsibility and for organizing draft papers into more useful materials; Mr. Lascelles Dixon, head of PDRT since 1979, for designing the cover and improving many of the illustrations; and Mrs. Christine Hinds and Miss Linette Johnson for typing the drafts and final manuscripts. Any comments on the series and its usefulness are welcome.

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MODULE 40

MOTIVATION OF EMPLOYEES

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A. PREREQUISITES:

B. DISCUSSION:

Motivation is the inner force that causes an individual to exert his own unique resources toward goal achievement.

C. PURPOSE:

Motivation of employees is necessary in any organization if the management is to be successful in reaching the organization's objectives.

Motivation of employees is created as a result of outside and inside stimuli and if these stimuli are correctly perceived and received by individuals the goals of the project are much more likely to be achieved.

D. USES OF MOTIVATION:

Motivation of employees must be based on a conscious effort of the manager to create the conditions and circumstances in which each individual in the organization is encouraged to use their natural talents and abilities to the greatest advantage.

E. FACTORS THAT CREATE THE MOST FAVOURABLE CLIMATE FOR MOTIVATING EMPLOYEES:

- 1) *Provide the opportunity for achievement of project objectives.* One of the primary elements for providing motivation is a good system of *communications* which will enable the employees and the management to communicate easily (without fear or reprisal), upward, downward and sideways in the organization. Everyone in the organization is entitled to know what to expect, what is going on and why! Everyone must know what the project objectives are, the progress being made, and the problems and policies of the organization.

The flow of communications just doesn't happen. It must be made to happen by doing certain things, i.e., setting up

committees, requests for reactions about actions to be taken, face to face discussions with each employee, regular information releases on plans and progress toward objectives, and a suggestion box for employees.

The matrix form of organization in relation to projects (SEE MODULE 5) makes it imperative that a good system of communications exist because of the complexity of the organization. Management must exert an even greater effort than is usual in the strict "line organization", if it is to provide the opportunity for the employees to achieve project objectives.

- 2) *A program of employee participation* is important for employee motivation. Involvement and understanding are achieved through participation. This does not mean that employees are to be involved in decision making, but the seeking of their advice and counsel feeds the employee's self value and creates job satisfaction. This will enhance employee performance and move the project toward its objectives. Regular meetings and consultations with selected employees will permit them to participate. The results of these meetings should be disseminated among the employees and recognition given to the involved employees for their contribution on this process. Another way for encouraging employee participation is the use of committees that involve the employees in the non-work related activities of the company, as well as the solution to policy problems that may arise. They can help gather together relevant information and suggest possible solutions.
- 3) *Centre on objectives and goals* rather than on skills and activities. Objectives are what must be stressed. They are the basis for the goals of each person in the organization. The ability of the management to centre on the organization's goal and objectives is likely to be the key to successful project management. This means getting the employees to set their own personal goals so the project goals will be accomplished. Only a searching look at each individual's contribution to the whole, and the involvement of each employee in the setting of their own personal goals, will enable the employees to make a maximum contribution to the project.

The manager must give each employee the opportunity to set his own goals and visualize the results of his effort in concise and measurable terms. When this is done it gives the management the basis for evaluating the employee in relation to what "his" goals are and what he believes "he will do" to reach his goals.

When the employee states his goals and the results he will generate to reach these goals, he must at the same time be made aware of the system of rewards and penalties that will come into play to reward success - and assess penalties - as earned. These rewards or penalties must be administered as quickly as possible after the employee's evaluation has been completed.

- 4) The manager and supervisors must *set the example* in order to generate the needed "self-generating enthusiasm". This provides a large part of the motivating force. In short, the boss must lead the way. The manager must do as he expects others to do and have confidence in their ability to do their jobs. He must be *sincere, honest, and humble* with those with whom he works. Respect the employees as persons with feelings, aspirations, values, and knowledge about their jobs just as you would expect to be treated. Make each person feel that he is a definite part of the total project and that his contribution is needed and appreciated. The manager must be enthusiastic and positive and run the organization according to the rules, and never bend the rules to favour anyone including friends, relatives and most of all himself.
- 5) The manager and supervisors should *avoid negative approaches*. The vast majority of people want to achieve, so the supervisors must approach the work with a positive, "it can be done", attitude. If the management's attitude sets the tone for the work force, employees tend to emulate the actions and reactions of their designated leaders. If these leaders approach their jobs with a negative attitude, there is a very strong likelihood that the workers will do the same. The tendency is to take longer to do tasks, avoid the difficult, and spend time complaining and making excuses for failure to perform.

There are different lists of principles that appear in the literature, for creating the necessary climate to achieve the desired results through others. The following list incorporates those principles most relevant to motivation. Because motivation of employees is so closely associated with communication and change, the principles of communications and change are integrated into these principles of motivation.

PRINCIPLES OF MOTIVATION

- PRINCIPLE 1. Motivation is the central activity of management on which all success depends.
- PRINCIPLE 2. Motivation is generated from within the individual in response to either an exterior or interior stimulus.
- PRINCIPLE 3. Each individual interprets and perceives outside stimuli according to his own unique circumstances.
- PRINCIPLE 4. Each individual has a limitless need for personal satisfaction.
- PRINCIPLE 5. Successful motivation programs will be constructed to allow personal satisfactions to be in harmony with organizational goals.
- PRINCIPLE 6. Managers are responsible for creating the working environment or climate that allows motivation to occur.
- PRINCIPLE 7. The manager's shadow is cast over all those he manages and they are likely to mirror his image.
- PRINCIPLE 8. The manager is what his self image allows him to be.
- PRINCIPLE 9. It is only by obtaining accurate readings of our behavior that we can change and correctly modify it to be most effective in motivating others successfully.
- PRINCIPLE 10. Rules relating to use of authority or power:
1. Power flows upward as well as downward in the organization.
 2. Most people want to do the right thing.
 3. People have far more ability than they are releasing.
 4. The manager is responsible for serving his subordinates and for their success.
 5. Because responsibility is shared, he must help his subordinates achieve rather than forcing them to achieve.

6. When authority, responsibility, and accountability are shared there will be greater achievement.

PRINCIPLE 11. Six steps to participative management:

1. A problem is perceived or recognized by either the manager or subordinate.
2. Subordinate takes responsibility for considering solutions with manager's help.
3. Manager and subordinate mutually consider implications of solutions.
4. Subordinate selects a solution manager can accept.
5. Subordinate tries to implement solution, and manager supports him in every way.
6. Subordinate finds the new solution acceptable and adopts it or finds it unacceptable and abandons it.

PRINCIPLE 12. Questions for the manager: (when adopting participative management styles)

1. What do I presently do that my subordinate could do as well or better than I?
2. Is my subordinate capable of making some of the decisions, within the framework of his job, that someone else is making?
3. What are the costs and risks of subordinate involvement in decision making and goal setting?
4. As the subordinate grows, what training or knowledge is it necessary to give him?
5. Am I honestly and sincerely ready to share responsibility and authority with my subordinates?

PRINCIPLE 13. Employee's test for the boss:

1. Is he aware of me? Can I turn to him for help?

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6

2. Will he do something to help me solve this problem?
3. Does he respect and know me as a human being?

PRINCIPLES OF CHANGE

- PRINCIPLE 14. Change will occur with ever-increasing velocity for change itself creates faster changes.
- PRINCIPLE 15. The emphasis of the manager in a change situation, in which experience no longer rules, must be on learning and teaching.
- PRINCIPLE 16. In today's dynamic world the status quo is change.
- PRINCIPLE 17. Today's manager must consider the total effects of his organization and its output on the quality of life, on individual needs, and on society in general.
- PRINCIPLE 18. To conquer change, the manager must:
1. Honestly attempt to remain informed about what is going on. A searching look at the world, the community, society, his people, his competition, his organization, can avoid the disaster of an avalanche of change, which in reality was merely an accumulation of innovation over time.
 2. Provide for the continuous development and education of his people. By considering the changing job requirements, the psychological impacts, the new knowledge needed, he can keep his staff abreast of technological and scientific change.
 3. Recognize the potential for innovation from within the organization. He must create a situation where the creative fruits of his own people can be harvested.
- PRINCIPLE 19. People resist change because:
1. the human being's natural reaction to change is negative;
 2. they fear job loss or depreciation of worth;

1

3. they have fear, awe, or outright animosity toward anything they don't understand, and particularly something they feel maybe a machine intruding into the human domain.

PRINCIPLES OF MOTIVATION

PRINCIPLE 20. Tips for introducing change or innovation.

1. Pre-condition employees at all levels to the introduction of the change. Secure full support of management team and create a cooperative spirit in giving advance communication regarding the change.
2. Plan participation of those affected. Let them be a part of the responsibility for success and the decision making role. Make sure there is understanding of the scope, needs, and goals of the change.
3. Orientate everyone on their role in the program's success. Indicate the new challenges and opportunities created. Be honest and factual regarding job security, stability, and the importance of the human contribution. Explain how the system will operate. (See Appendix 36.6 - checklist for Employee Orientation)
4. Provide for needed training well in advance of the program.

PRINCIPLE 21. A man's worth to an organization is directly proportional to his opportunity for performance.

PRINCIPLE 22. Questions managers must ask are: (to test motivation)

1. Is the atmosphere vital, friendly, happy, or sullen, servile and glum?
2. Do employees stop their conversation when you appear, or do they include you?
3. How many suggestions or new ideas for improvements do you receive?
4. When was the last time someone disagreed with you?

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5. Is there a spirit of cooperativeness and team-work?
6. Are people developing and growing both on and off the job?
7. Are employees setting reasonable goals?
8. Do my subordinates require constant supervision?
9. Are there irrational or excessive over-reactions to problems?
10. Does everyone seem to be stereotyped in their behavior?

PRINCIPLE 23. No human being can be truly successful and productive unless he is expressing his own inherent potential.

PRINCIPLE 24. Management should concentrate first on the overall motivational climate and then on individual problem cases.

PRINCIPLE 25. Man's behavior is controlled by a composite of his heredity, his historical experience, and his present environment.

PRINCIPLE 26. Jobs that do not meet basic biological needs have few takers and those that do fill them will generally be on the lower end of the productivity scale.

PRINCIPLE 27. A motivational program is not a free-standing, isolated program, but one incorporating:

1. organization policies, procedures, and objectives;
2. attitudes, philosophy, values, and actions of management;
3. the creation of proper working conditions or climate;
4. the wise use of the tools of motivation to meet needs.

PRINCIPLE 28. Money, in and of itself, is not a motivator, but managers must recognize it as a tool to be used in meeting the needs of man which do cause motivation.

- PRINCIPLE 29. Fear is a negative motivational condition and will rob employees of the desire to try to achieve their potential productivity.
- PRINCIPLE 30. Each individual has a changing hierarchy of needs which varies according to his experiences and present situation.
- PRINCIPLE 31. A man's position in the organization has a large influence on his priority of needs.
- PRINCIPLE 32. The manner in which a person evaluates and determines his needs affects the kinds of jobs he can perform successfully.
- PRINCIPLE 33. Job success is largely dependent on the correct matching of the individual needs with job satisfactions.
- PRINCIPLE 34. Individual motivational needs will shift as job changes occur, but a drastic change is unlikely.
- PRINCIPLE 35. Performance of the individual should lead to satisfaction and not vice versa.

6 GOLDEN KEYS OF MOTIVATION

1. Perception
 2. Feedback
 3. Goal Setting
 4. Participation
 5. Relevancy
 6. Evaluation
- PRINCIPLE 36. High effort must be balanced with similar rewards in terms of needs and satisfactions of the individual.
- PRINCIPLE 37. People perceive their world according to their needs, and their perception of the job environment in meeting them.
- PRINCIPLE 38. Accuracy in evaluating perceived needs can best be secured through feedback from others.

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- PRINCIPLE 39. Goal setting will give us more accurate information on estimating the discrepancy between the actor and the real person.
- PRINCIPLE 40. Goals should be set which are neither so low as to fail to provide opportunity for incentive, nor so high as to insure failure, and above all, in the light of reality of accomplishment.
- PRINCIPLE 41. Participation must be real, it must involve the important aspects of the job at any level if it is to fuel motivation and job performance.
- PRINCIPLE 42. Relevance of facts and concentration on what is necessary for accomplishment and performance will result in successful motivation.
- PRINCIPLE 43. Only through evaluation can an employee or his manager know what is going on.
- PRINCIPLE 44. A scheduled, regular, objective evaluation of every individual on a planned basis will contribute to his successful performance.
- PRINCIPLE 45. A goal or result found in the job profile meets the following 9 qualifications; *A result is...*
1. Designed to increase the performance score of the employee.
 2. Tied into the manager's goals and thus to the organizational goals.
 3. Found in the area of personal involvement and responsibility of the employee.
 4. Designed so that progress and evaluation can be measured fairly.
 5. To allow the employee to exert maximum participation and creativity so he can match his goals with organizational goals as much as possible.
 6. Designed to challenge and spur the growth and development of each employee to his potential.
 7. To enhance the process of communication between superior and subordinate.

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11

8. To serve as device for improving organizational control and integration.
 9. Provide goals that are flexible rather than static in nature.
- PRINCIPLE 46. Consider group interaction when setting goals, so both individual contribution and teamwork are properly expressed and defined.
- PRINCIPLE 47. Self generated motivation occurs most successfully when an employee is directing his efforts toward definite goals he has helped set.
- PRINCIPLE 48. Evaluation is not a reward - punishment session, but rather a review of progress, growth, and development.
- PRINCIPLE 49. Evaluation should:
1. cause improved motivation and increased performance in the future;
 2. identify those with greater potential, and ready for increased challenges;
 3. provide knowledge for decisions relative to transfer, promotion, and salary;
 4. provide an employee with benchmarks of his achievement and accomplishment;
 5. provide information to the manager as to his success and what further contribution he can make; and
 6. provide the fuel for reformed or remodeling goals for the future.
- PRINCIPLE 50. Each individual should be evaluated against his own goals, and for his own accomplishment.
- PRINCIPLE 51. Competition is likely to be successful when individual goals are closely related to those of the immediate group as well as the broad organizational objectives.
- PRINCIPLE 52. Each person has a potential for solving a problem or accomplishing a task, and the more involved they are in contributing to the solution the less they will feel compelled to oppose it.

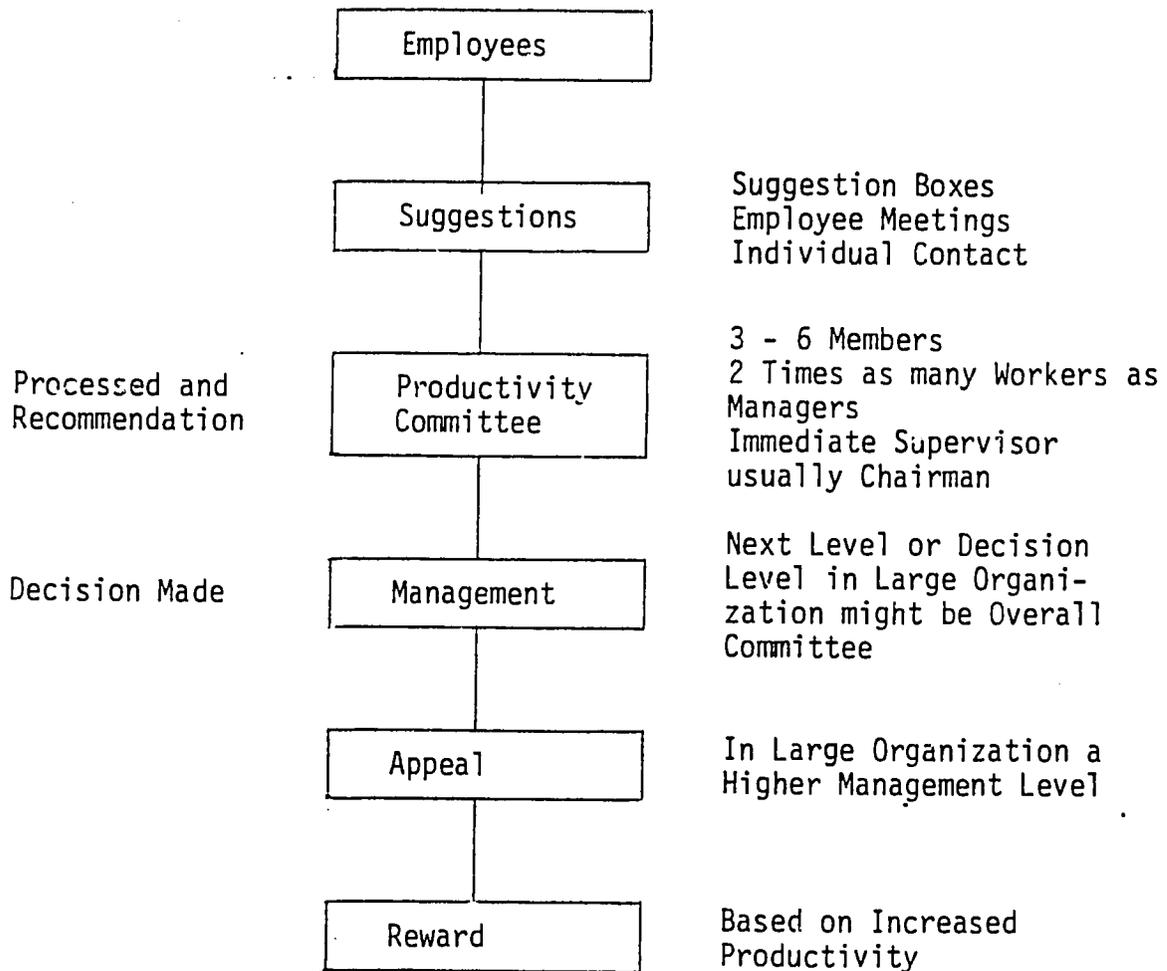
- PRINCIPLE 53. Providing different routes for recognizing the contribution of people will increase the chances for motivational success.
- PRINCIPLE 54. Rules for Parallel Promotion:
1. The promotion ladder must be real and meaningfully related to achievement and ability.
 2. It must be recognized by management and peers as such.
 3. Rewards must be commensurate with similar contributions of the management cadre.
- PRINCIPLE 55. Motivation and high job performance are virtually impossible when the employee and the job are not matched.
- PRINCIPLE 56. Rules for matching the person and the job:
1. Determine what the job actually requires in the way of skills, knowledge, experience, emotional or personality factors.
 2. Decide if it is an entry job with promotional possibilities built-in along with training, or if it is basically a terminal job with little chance for advancement.
 3. Use tests for determining specific skills or levels of attainment if possible. Use only valid testing programs.
 4. Be sure to present the job accurately and fairly to the candidate. Do not underrate its demands or overrate the potentials for growth and development.
 5. Make sure through self-appraisal that you are not swayed by prejudicial ideas about people, race, color, age, sex.
- PRINCIPLE 57. Job-testing success is dependent upon thorough knowledge of the requirements of the job.
- PRINCIPLE 58. Testing at its best can only provide people with the potential for doing the job. It does not guarantee they will do the job.

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13

- PRINCIPLE 59. The more phases of "job orientation" that are carried out by the new employee's immediate supervisor and his fellow workers, the more successful it will be.
- PRINCIPLE 60. A good incentive plan must move the majority of your people to increased productivity over the long run.
- PRINCIPLE 61. Tests for an "Incentive Plan." It must provide for:
1. Increased productivity
 2. Frequent feedback
 3. Flexibility to change
 4. Teamwork and cooperation
 5. Long range programming
 6. Understanding and fairness
 7. Broad participation
 8. Meeting organizational objectives
- PRINCIPLE 62. Basics of the "Scanlon Plan" are:
1. Productivity committee
 2. Employee participation system
 3. Processing procedure
 4. Management decision
 5. Appeal process
 6. Measured rewards

PRINCIPLE 63. System of the "Scanlon Plan."



PRINCIPLE 64. The productivity committee meets monthly and does the following things:

1. Makes sure that each suggestion received is properly recorded and adequately presented for management's consideration. (Some suggestions will require further facts or development.)
2. Makes sure action is clearly taken and that response or feedback is made to the proper group or persons.
3. Processes all suggestions submitted, including those still not completed and makes recommendations.

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15

4. Considers any other problems or opportunities in regard to performance and productivity. (Often the manager will institute problems for discussion.)
5. Forwards recommendation to proper management level for final decision. (It is most important to recognize that the committee does not manage.) The final right to accept or reject any recommendation is reserved for management! The committee must not become embroiled in union business, grievances, wages, etc. Its activities are restricted to operating improvements only.
6. The committee must provide an accurate record of its deliberations and activities so full communication can be achieved at all levels.

PRINCIPLE 65. Employee meetings held at regular periods coinciding with the rewards time span should follow this procedure:

1. The first order of business is to analyse the performance of the previous period and why it was good or bad. This requires the availability of sound and reasonable records of productivity and standards of performance.
2. Any organizational problems or matters of interest which management wishes to communicate to employees should be reviewed.
3. Discussion and action taken on past recommendations and suggestions and why such action or disposition was made.
4. Solicitation of new ideas, recommendations, responses and problem identification from all concerned.
5. Discussion and information as to results-rewards measures and what they will be for the period. This must be presented in an understandable and meaningful manner. Particular recognition for outstanding achievement or contribution should be made at this time to maximize and encourage future efforts.

PRINCIPLE 66. A manager's expectations are the key to a subordinate's performance and development.

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PRINCIPLE 67. The way the manager treats his subordinates largely determines their performance and progress.

PRINCIPLE 68. Principles of Vertical Job Loading

<i>PRINCIPLE</i>	<i>MOTIVATORS INVOLVED</i>
A. Removing some controls while retaining accountability	responsibility and personal achievement
B. Increasing the accountability of individuals for own work	responsibility and recognition
C. Giving a person a complete natural unit of work (module, division, area, etc.)	responsibility, achievement and recognition
D. Granting additional authority to an employee in his activity; job freedom	responsibility, achievement, and recognition
E. Making periodic reports directly available to the worker himself rather than to the supervisor	internal recognition
F. Introducing new and more difficult tasks not previously handled	growth and learning
G. Assigning individuals specific or specialized tasks, enabling them to become experts.	responsibility, growth and advancement

ENLARGEMENT VS. ENRICHMENT OF CORRESPONDENTS' TASKS IN COMPANY EXPERIMENT

<i>Horizontal Loading Suggestions</i>	<i>Vertical Loading Suggestions</i>
Firm quotas could be set for letters to be answered each day, using a rate which would be hard to reach.	Subject matter experts were appointed within each unit for other members of the unit to consult with before seeking supervisory help. (Supervisor had been answering all specialized and difficult questions.)

The women could type the letters themselves, as well as compose them, or take on any other clerical functions.

All difficult or complex inquiries could be channeled to a few women so that the remainder could achieve high rates of output. These jobs could be exchanged from time to time.

The women could be rotated through units handling different customers, and then sent back to their own units.

Correspondents signed their own names on letters. (Supervisor had been signing all letters.)

Work of the more experienced correspondent was proofread less frequently by supervisors and was done at the correspondents' desks, dropping verification from 100% to 10%. (Previously, all correspondents' letters had been checked by supervisor.)

Production was discussed, but only in terms such as "a full day's work is expected." As time went on, this was no longer mentioned. (Before, the group had been constantly reminded of the number of letters that needed to be answered.)

Outgoing mail went directly to the mail room without going over supervisors' desks. (Letters had always been routed through the supervisors.)

Correspondents were encouraged to answer letters in a more personalized way. (Reliance on the form letter approach had been standard practice.)

Each correspondent was held personally responsible for the quality and accuracy of letters. (This responsibility had been province of supervisor and verifier.)

- PRINCIPLE 69. Necessary steps to installing a "job enrichment" program include:
1. Initially select jobs where cost of change is relatively low, attitudes are poor, hygiene is becoming costly, and motivation can make a difference.
 2. Approach the change with conviction that you and your subordinates can successfully change to meet the new dimensions.
 3. Brainstorm a list of changes that may enrich the job, without passing judgment on them. This is the point to involve subordinates.
 4. Screen the list to weed out impractical ideas, those stated in generalities, those tending toward horizontal loading, etc. It is management's responsibility to determine final job content.
 5. If possible, set up an experimental grouping. Introduce the new motivators a step at a time to allow assimilation to occur. Use simplest ones first to insure success building on success. Keep track of performance.
 6. Be sure your direct line supervisors understand and are with you in the effort.

PRINCIPLES OF COMMUNICATION

DEFINITION OF COMMUNICATIONS IN MANAGEMENT:

COMMUNICATION, WITHIN MANAGEMENT, IS A MEANINGFUL EXCHANGE OF UNDERSTANDING TO ACHIEVE A FAVOURABLE RESPONSE.

- PRINCIPLE 70. Understanding can occur only when there is common knowledge.
- PRINCIPLE 71. There must be a common sharing of the meaning of words before understanding can occur.
- PRINCIPLE 72. The more subjective the message, the more difficulty we have in securing understanding.

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19

- PRINCIPLE 73. There is always feedback from any message that is received.
- PRINCIPLE 74. A good message is not only understood, it also achieves a favourable response.
- PRINCIPLE 75. When the purpose of a message is emotionally important it can usually be achieved most successfully by personal contact.
- PRINCIPLE 76. The more of the senses that are involved, the more effective communication becomes.
- PRINCIPLE 77. To insure the most successful understanding, keep it simple, keep it short.
- PRINCIPLE 78. When there is not understanding, there is quite apt to be misunderstanding.
- PRINCIPLE 79. All messages must be sent with the knowledge that the receiver will interpret them as he sees fit, as a unique human being.
- PRINCIPLE 80. Barriers to communication:
1. Physical Barriers -- space, distance, time, distractions, etc.
 2. Personal Barriers -- values, judgments, desires, attitudes.
 3. Semantic Barriers -- different meanings of words, phrases, and symbols.
- PRINCIPLE 81. Standards or criteria must be established before making an evaluation.
1. What we are accustomed to or expect becomes the norm and only departures from the norm are noted.
 2. Criteria should be based on fact rather than desire or wishful thinking.
 3. Something is good or bad compared to what?
- PRINCIPLE 82. Objective descriptions are quantitative;
1. How many, how much, how often (three times a week rather than frequently).

- PRINCIPLE 83. Think in terms of continuous rather than categories.
1. Look at the big picture.
 2. Seldom is something either black or white. The truth is probably in the grey area.
- PRINCIPLE 84. Evaluate ideas, situations, or people on individual merit rather than pre-judging from generalizations.
1. A generalization to be useful must be based on scientific fact or a long series of similar experiences.
- PRINCIPLE 85. Check for supporting evidence when you give or hear opinions.
1. Our wishes, likes, dislikes, tend to influence our own opinions or our evaluation of the opinions of others.
 2. Is the statement a fact based on scientific evidence or long experience or are you accepting it because you like the person making the statement or because it is a statement that agrees with your feelings?
- PRINCIPLE 86. The level of listening depends on the mental activity of the listener.
1. The non-hearing level.
 2. The hearing level ... little remembered.
 3. The thinking level ... good retention.
- PRINCIPLE 87. Try to eliminate outside distractions which divert the listener's attention.
- PRINCIPLE 88. When distractions cannot be eliminated more effort must be extended to concentration on the speaker's subject.
- PRINCIPLE 89. Avoid mental arguments with what a speaker is saying. Concentrate on what he is saying and why he is saying it.
- PRINCIPLE 90. Listen for ideas instead of trying to remember all the facts a speaker may give. He may be giving several facts to develop only one or two main ideas.

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- PRINCIPLE 91. Limit your note-taking to main ideas. Concentrate on what a speaker is saying and write down only enough to help you recall the main ideas.
- PRINCIPLE 92. Do not let your emotional reaction to a person's appearance or mannerisms divert your concentration from what he is saying.
- PRINCIPLE 93. Your concentration ability can be improved with practice.

To carry out a program of motivation, a manager must recognize the needs of the people in his organization. Basically every person has needs that they desire to fulfill. The order of priority put on these needs is an individual choice with the exception of the very basic ones such as food, water and shelter, and even these are influenced by individual choice in terms of quantity needed, e.g., some people have greater need for food than others after the subsistence level is reached. A list of the needs and associated job factors are shown below with a definition of those that are not biological.

NEEDS AND ASSOCIATED JOB FACTORS

BIOLOGICAL NEEDS

Food & Water
Sex
Security
Shelter
Physical Comfort
Freedom from Fear

BIOLOGICAL JOB RELATED FACTORS

Money or Pay
Fringe Benefits
Working Conditions
Hours of Labor
Managerial Relationships
Job Stability

SOCIAL NEEDS

Recognition
Respect
Status
Acceptance
Companionship
Reputation

SOCIALLY RELATED JOB FACTORS

Learning & Training
Advancement & Promotion
Authority & Responsibility
Relationships with:
 work group
 supervisor or administration
Social Image of Organization
Social Image of Job

INDIVIDUAL NEEDS

Achievement
Growth & Development
Creativity & Innovation
Contribution
Accomplishment
Power
Pride

INDIVIDUAL RELATED JOB FACTORS

Gaining Knowledge & Skills
Freedom of Action
Challenging Atmosphere
Job Importance
Leadership Roles
Participation in Decisions
Enrichment & Variety
Goal Setting
Change & Innovation

Each of these job factors can meet needs or cause frustration and conflict in meeting needs. How you use the tools of motivation and create the motivational climate can cause either job satisfaction or job dissatisfaction. It should also be pointed out that the same things that cause satisfaction for one person may cause dissatisfaction for another. As time and positions change, the individual's priority of needs may change and satisfactions at one time and place may become dissatisfactions at another time and place.

THE CHALLENGE TO THE MANAGER IS TO DEVELOP PROGRAMS WHICH PROVIDE THE MAXIMUM FLEXIBILITY IN SATISFYING INDIVIDUAL, CHANGING NEEDS, WHILE MAINTAINING ENOUGH MANAGERIAL CONTROL TO BE SURE PROJECT NEEDS ARE MET.

DEFINITION OF MAJOR NEEDS IN FUTURE

*RECOGNITION -- Outstanding performance earns praise and fulfillment from manager and/or peers.

RESPECT -- Feels satisfied that he is well regarded by manager and/or peers.

*STATUS -- Involves his image or relationships with others either the manager and/or peers.

ACCEPTANCE -- Feels he is part of the group or team effort.

COMPANIONSHIP -- The feeling of affection, friendship and identifying with the group.

*REPUTATION -- The image he feels others have of his ability and skill in his job assignment.

*ACHIEVEMENT -- The feeling of meeting and achieving pre-determined goals and challenges that are meaningful and known.

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23

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GROWTH -- The feeling that one is gaining and developing his knowledge, skills, and abilities.

CREATIVITY -- Being able to exert individual innovative approaches to job situation.

*POWER -- The ability to exercise leadership over others, to influence or direct the goal setting process of others or the organization.

PRIDE -- The self knowledge that a difficult task has been achieved or a job is being done well.

CONCENTRATION -- The feeling of being involved with others in successfully achieving team objectives, of having done your part of the whole.

*ACCOMPLISHMENT -- A sense of responsibility for not only our actions but for others as well. A willingness to help others grow and achieve.

*These needs are generally stronger in those who make good managers or supervisors.

Early PDRT working papers relevant to this topic include "Management of People", M. Kettering and J. Kristiansen, 1977. (12 pages).

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APPENDIX 40.1

Exercise 1

*THE HUMAN EQUATION -- ITS MANAGEMENT AND VALUE

NOTE: Check that area most closely approximating your opinion of what is going on in your organization. Please be honest as this exercise is for your own understanding only! Don't study the question, but check your first reaction.

QUESTIONS:		SYSTEM 1.	X	SYSTEM 2.	X	SYSTEM 3.	X
L E A D E R S H I P	1. The confidence shown in subordinates	Little		Condescending		Completely	
	2. Subordinates feel they can talk freely to their supervisors	Not Much		Sometimes		Nearly Always	
	3. There is a conscious seeking and use of subordinates' ideas	Sometimes		Whenever Desired		Nearly Always	
	4. Subordinates do shoulder responsibility and are self directing	Very Seldom		Sometimes		Nearly Always	
	5. Subordinates must be watched constantly to insure proper work responses	Most of the Time		Sometimes		Very Seldom	
	6. Men are inherently lazy and careless about work	Mostly		Somewhat		Seldom	
M O T I V A T I O N	1. Predominant use is made of the following motivators - i.e., fear, threats, punishment	Often		Sometimes		Almost Never	
	2. Employees are allowed to help set their own work goals	Nearly Always		Mostly		Seldom	
	3. Employees work mostly for money rather than achievement	Nearly Always		Mostly		Seldom	

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25

APPENDIX 40.1

QUESTIONS:		SYSTEM 1.	X	SYSTEM 2.	X	SYSTEM 3.	X
	4. Responsibility for reaching organizational objectives is felt	Mostly at Top		Top and Middle		At All Levels	
C O M M U N I C A T I O N	1. Information on how the total organization is doing is given subordinates	Very Little		Little		A Great Deal	
	2. What is the direction of information flow?	Downward		Downward		Sideways	
	3. Downward communication is received with	Suspicion		Caution		Openness	
	4. Upward communication is	Often Wrong		Censored for Boss		Accurate	
	5. Upward Communication from subordinates is sought	Hardly Ever		Whenever Convenient or Useful		Nearly Always	
D I R E C T I O N	1. How well does the boss really know his subordinates	Not Well at All		Only Things He Wants To		Well Informed	
	2. Where does the knowledge used in making decisions come from	Top Management		Upper and Middle Management		From All Levels	
	3. Is there a conscious method for involving workers in decisions	Almost Never		When Convenient		Fully Involved	
	4. Is an evaluation of subordinates' performance made?	Whenever Something is Wrong		When Needed for Prodding		On a Regular Basis	

APPENDIX 40.1

QUESTIONS:

	SYSTEM 1.	X	SYSTEM 2.	X	SYSTEM 3.	X
5. Goals orientation and goal setting are used to contribute to motivation	Seldom		When Useful to Boss		Fully Involve Everyone	
TOTAL CHECKS						

*Adapted from work done by Rensis Likert,
Univeristy of Michigan, Ann Arbor, Michigan.

APPENDIX 40.2

Exercise 2

QUIZ

"DO YOU KNOW YOUR PEOPLE"

INSTRUCTIONS:

1. List the 5 most important people to you, and affecting your job and success as a manager. (Do not include family.) These can be subordinates, bosses, suppliers, consultants, bankers, etc.
2. Fill in rest of information blanks.

NAME	AGE	NO. OF CHILDREN	SPOUSE (NAME)	HOBBY
1.				
2.				
3.				
4.				
5.				

NOTE: When I return to my job, I will fill in this information for the 5 most important people affecting my success as a manager.

NAME	AGE	NO. OF CHILDREN	SPOUSE (NAME)	HOBBY
1.				
2.				
3.				
4.				
5.				

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APPENDIX 40.3

Exercise 3

(See Example on following pages.)

JOB PROFILE WORKSHEET

DATE _____

BY _____

POSITION _____

RELATIONSHIPS:

Responsibility --

Responsible to --

Responsible for --

Authority --

RESULTS (Job Goals):

Result I. (goal)

Activities --

Result II. (goal)

Activities --

EVALUATION:



APPENDIX 40.3

EXAMPLE OF A JOB PROFILE

Date: January 14, 1978
By: Manager of Production
Position: Assistant Production Manager

RELATIONSHIPS:

RESPONSIBLE FOR: This position will be responsible for shipping finished product, receiving raw products and supplies, storage and inventory of products and supplies, department personnel, operating and financial efficiency, purchasing all raw products and supplies, purchase of equipment used in department, janitorial services, and all necessary control data and information needed for departmental operation.

RESPONSIBLE TO: This position will report directly to the production manager for direction and evaluation of progress.

RESPONSIBLE TO THIS POSITION: 6 men shall report to this position, i.e., purchasing agent, chief shipping and receiving, 2 men in shipping and receiving, 2 men on janitorial services.

AUTHORITY CONFERRED:

SHIPPING - select carrier, schedule delivery, load product, select packaging and stacking methods, prepare shipping papers, maintain continuous inventory control of finished product.

RECEIVING - unload, store, handle all raw products, and supplies used and maintain inventory and use control records.

PERSONNEL - hire, train, discipline, and assign personnel, schedule work, overtime, and vacations. Determine attendance at schools, and training sessions, recommend termination, raises, promotion, or change of classification.

FINANCE - make spending decision within budget and may purchase up to \$500 worth of equipment within department without vice presidential approval.

APPENDIX 40.3

PURCHASING:- determine quantity, supplier, specification of quality, inventory supply, delivery schedule, mode of shipment, method of purchasing.

RESULTS:

1. *Create a job climate that encourages participation of all employees in goal setting and job achievement resulting in high job satisfaction and productivity.*
 - (a) each employee will have a "job profile" developed and reviewed annually.
 - (b) formal evaluation of employees will be made at minimum of 6 months intervals.
 - (c) monthly departmental employee meetings will be held to maintain two-way communication and encourage suggestions for improved operation.
 - (d) employees will be encouraged to take advanced training in their field of interest.
 - (e) salary schedules, promotions, and development and growth will be stressed.
 - (f) working conditions and overtime are equitable and reasonable.

2. *Insure an adequate supply of quantity of raw product and supplies for the production department in the least cost method to insure efficient and effective production of product.*
 - (a) secure competitive bids on all supplies and product used which exceeds \$500 in annual consumption.
 - (b) scheduled delivery and storage programs which will reduce cost and insure minimal cash flow drain based on a 30-day production schedule furnished by vice president of production.

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APPENDIX 40.3

- (c) maintain a 3-day supply of raw product plastics and a 30-day supply of other production supplies.
 - (d) develop a constant inventory plan in co-operation with office manager and staff employees.
 - (e) review material and supply quality specifications in co-operation with production manager and office manager on regularly scheduled basis (bi-monthly).
 - (f) work out method of improving use of raw materials product manager and employee.
3. *Assure proper handling of materials shipped and received to insure efficiency and quality.*
- (a) develop a new packaging and stacking plan for loading customer delivery in co-operation with marketing department.
 - (b) route trucks so least amount of overlapping is done and delivery is on time (before 4 p.m.).
 - (c) whenever possible, unload raw materials directly into production line from rail car and on to trucks from production line
 - (d) check with customers by survey of salesmen to determine timeliness and condition of finished product on delivery.
4. *Maintain pleasant and safe working conditions in plant to insure adequate employee morale for increased productivity.*
- (a) remove all scrap, debris, and rubbish from plant on daily shift basis.
 - (b) clean windows, floor, equipment and machinery on a regular basis.
 - (c) repaint and refurbish walls, equipment and machinery on a scheduled basis.

APPENDIX 40.3

- (d) paint and identify all safety hazard zones.
5. *Attempt to operate the department in such a way that costs are lowered and improved efficiency contributes generally towards increased production.*
- (a) establish a goal of handling all materials and supplies with the department for an overall cost of 8¢ per pound.
 - (b) establish and operate within a yearly departmental budget.
 - (c) schedule a workload that will minimize the need for overtime.
 - (d) study the feasibility of annual ordering of supplies and materials with regularly designated delivery dates to increase economic leverage.

EVALUATION:

- (a) The production manager will review progress toward job goals every 6 months and revise and update same at that time.
- (b) Weekly conference will be held with manager of production to determine short run problems and progress.
- (c) Manager of production will conduct an annual salary and wage review with assistant manager of production about his salary and his recommendation for personnel salaries.

APPENDIX 40.4

USING MOTIVATIONAL TOOLS IN DEVELOPING A JOB CLIMATE

INTRODUCTION: A manager must be able to exercise control over job factors to develop a motivational program. Job factors can be divided into 2 categories:

- (1) motivational tools; and
- (2) job climate.

DEFINITIONS: For purposes of this workshop, the following definitions are given:

Motivational Tools -- are largely exterior, management controlled job factors that stimulate or affect motivation. They are concrete and recognizable in nature, and when directed at employees will trigger fairly immediate response. For example ... money is one of the primary tools of motivation. It is the actions managers take, or the things they use to influence behavior, and they contribute to the motivational climate.

Job Climate -- is largely that part of job factors related to interior or self generated motivation. It is the condition which influences the kind of motivation that occurs; the part of the working environment created by management which allows self generated motivation to occur. The climate is how the individual perceives his job and his relationships with others, and the organization, to be.

These 2 job factors overlap. Our aim is to help you recognize job factors how they contribute to the motivational process. It is especially *important* to recognize that job factors may be positive or negative in nature.

ACME STORY

The project manager and a management consultant were discussing the need for a motivational program on the project. The consultant pointed out to the manager that the motivational program would consist of not only direct actions or things management could do or use (tools), but equally important, the creation of the right job conditions (climate). By using these two approaches skillfully, the needs

APPENDIX 40 .4

and job satisfactions of the employee could be met and positive inner motivation could occur. He stressed the fact that an overall motivational program involved:

- (1) organizational policies, procedures, practices, and objectives.
- (2) attitudes, philosophy, values, and actions of management.
- (3) creation of a proper working condition or climate.
- (4) using the tools of motivation wisely to meet needs.

Remember, motivational tools create job climate which allows job satisfaction that either frustrate or meet individual employee's needs.

To fortify the manager's knowledge of how this process works, the management consultant asked the manager to complete the following exercise. Your job is to help the manager. Do this as a group. Fill in the blanks with the most appropriate answer in your group's opinion. You will find there is considerable overlapping, but this only stresses the complex nature of the motivational process. (See "Needs and Associated Job Factors" attached.)

*MOTIVATIONAL TOOL	JOB CLIMATE	INDIVIDUAL NEEDS
(example) Retirement Dinner	Work appreciation	Recognition
Goal Setting	Participation in Decisions	_____
Promotion to Foreman	Authority over Others	_____
Job Seniority	Job Stability	_____
Training	Advancement Opportunity	_____
Good Lighting	Good Working Conditions	_____
Employees Picnic	Peer Group Support	_____

APPENDIX 40.4

NEEDS AND ASSOCIATED JOB FACTORS

BIOLOGICAL NEEDS

Food and Water
Sex
Security
Shelter
Physical Comfort
Freedom from Fear

BIOLOGICAL JOB RELATED FACTORS

Money or Pay
Fringe Benefits
Working Conditions
Hours of Labor
Managerial Relationships
Job Stability

SOCIAL NEEDS

Recognition
Respect
Status
Acceptance
Companionship
Reputation

SOCIALLY RELATED JOB FACTORS

Learning and Training
Advancement and Promotion
Authority and Responsibility
Relationships with:
 work group
 supervisor or administration
Social Image of Organization
Social Image of Job

INDIVIDUAL NEEDS

Achievement
Growth and Development
Creativity and Innovation
Contribution
Accomplishment
Power
Pride

INDIVIDUAL RELATED JOB FACTORS

Gaining Knowledge and Skills
Freedom of Action
Challenging Atmosphere
Job Importance
Leadership Roles
Participation in Decisions
Enrichment and Variety
Goal Setting
Change and Innovation

Each of these job factors can meet needs or cause frustration and conflict in meeting needs. How you use the tools of motivation and create the motivational climate can cause either job satisfaction or job dissatisfaction. It should also be pointed out that the same things that cause satisfaction for one person may cause dissatisfaction for another. As time and positions change, the individual's priority of needs may change and satisfactions at one time and place may become dissatisfactions at another time and place.

APPENDIX 40.4

DEFINITION OF MAJOR NEEDS IN FUTURE

*RECOGNITION -- Outstanding performance *earns* praise and fulfillment from manager and/or peers.

RESPECT -- Feels satisfied that he is well regarded by manager and/or peers.

*STATUS -- Involves his image or relationships with others either the manager and/or peers.

ACCEPTANCE -- Feels he is part of the group or team effort.

COMPANIONSHIP -- The feeling of affection, friendship and identifying with the group.

*REPUTATION -- The image he feels others have of his ability and skill in his job assignment.

*ACHIEVEMENT -- The feeling of meeting achieving pre-determined goals and challenges that are meaningful and known.

GROWTH -- The feeling that one is gaining and developing his knowledge, skills, and abilities.

CREATIVITY -- Being able to exert individual innovative approaches to job situation.

*POWER -- The ability to exercise leadership over others, to influence or direct the goal setting process of others or the organization.

PRIDE -- The self knowledge that a difficult task has been achieved or a job is being done well.

CONTRIBUTION -- The feeling of being involved with others in successfully achieving team objectives, of having done your part of the whole.

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APPENDIX 40.4

*ACCOMPLISHMENT -- A sense of responsibility for
not only our actions but for others as well.
A willingness to help others grow and achieve.

*These needs are generally stronger in those who
make good managers or supervisors.

Our No. 1 challenge then, is to develop programs which provide the
maximum flexibility in satisfying an individual's changing needs, while
maintaining enough managerial control to be sure organizational needs are
met profitably.

APPENDIX 40.5

Exercise 4

DIRECTIONS: As a group, fill in "A" & "B" & "C" as you see it.

GUIDE FOR MATCHING PEOPLE AND THE JOB

A. WHAT IS THE JOB? (General list of results and activities to be accomplished; a job profile, if it exists, will be helpful.)

B. WHAT KIND OF JOB IS THIS? (List here needs related to growth, type of supervision, training, relationships, responsibilities, leadership, teamwork, and any other special factors.)

DATE _____ NAME _____
INTERVIEWER _____

(9) OTHER REQUIREMENTS NOT COVERED		
(8) TESTING REQUIREMENTS TESTS OF APTITUDE, DEXTERITY, PERSONALITY, ETC.		
(7) EMOTIONAL REQUIREMENTS, SUCH AS STRESS, MATURITY, MOTIVATION, PERSISTENCE ETC.		
(6) PERSONALITY AND REQUIREMENTS: ANY SPECIAL FACTORS, TEAMWORK, LEADERSHIP, OUTGOING, ETC.		
(5) PHYSICAL REQUIREMENTS, ANY LIFTING, STRENGTH, AGE, DEXTERITY, ETC.		
(4) APPEARANCE REQUIRED, ANY SPECIAL CHARACTERISTICS SUCH AS DRESS, GROOMING, ETC.		
(3) EXPERIENCE REQUIRED, ANY SPECIAL KIND OR LENGTH OF EXPERIENCE		
(2) SKILLS REQUIRED, ANY SPECIAL SKILLS NEEDED		
(1) EDUCATIONAL REQUIREMENTS: WHAT KIND OF EDUCATIONAL LEVEL IS NECESSARY FOR THE JOB		

FACTORS:

(C) REQUIREMENTS for the job described above
YOUR RATING of how candidate meets requirements

31

APPENDIX 40.6

Exercise 5

CHECK LIST FOR EMPLOYEE ORIENTATION

Name _____

Job _____

Date Employed _____

SUBJECT

1. Information on employee policies:

	<u>WHO</u>	<u>WHEN</u>	<u>DATE COMPLETED</u>
a. wages (basic-rates-etc.)	_____	_____	_____
b. incentive program	_____	_____	_____
c. promotion (policies and potential)	_____	_____	_____
d. union (deductions-policy)	_____	_____	_____
e. hours (starting-quitting-etc.)	_____	_____	_____
f. overtime (policy-premiums-etc.)	_____	_____	_____
g. vacation (schedules-length-etc.)	_____	_____	_____
h. holidays (number-policy-etc.)	_____	_____	_____
i. insurance (contribution-benefits-etc.)	_____	_____	_____
j. training (opportunities-needs-etc.)	_____	_____	_____
k. other fringe benefits	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

2. Knowing the Organization:

a. tour of facilities or plant	_____	_____	_____
b. organizational plan - structure	_____	_____	_____

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4/3

APPENDIX 40.6

<u>SUBJECT</u>	<u>WHO</u>	<u>WHEN</u>	<u>DATE COMPLETED</u>
c. organizational objectives	_____	_____	_____
d. introduce "job profile"	_____	_____	_____
e. discuss products produced	_____	_____	_____
f. principle markets	_____	_____	_____
g. organizational standing	_____	_____	_____
h. growth and development	_____	_____	_____
i. miscellaneous	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
3. Establishing the right relationships:			
a. meeting first day	_____	_____	_____
b. introducing to team members	_____	_____	_____
c. appoint buddy	_____	_____	_____
d. review job and job relationships	_____	_____	_____
e. review organization of team	_____	_____	_____
f. tour facilities (i.e., lunchroom, washroom, lockers, parking, etc.)	_____	_____	_____
g. discuss policy and rules (i.e., tardiness, absenteeism, coffee break, lunch hour)	_____	_____	_____
h. review safety regulations	_____	_____	_____
i. review hours and wages, etc.	_____	_____	_____
j. other	_____	_____	_____
_____	_____	_____	_____

91

APPENDIX 40.6

SUBJECT

4. Job expectations and performance:

	<u>WHO</u>	<u>WHEN</u>	<u>DATE COMPLETED</u>
a. assign trainer	_____	_____	_____
b. review training program	_____	_____	_____
c. review team approach and goals	_____	_____	_____
d. explain requirements of job	_____	_____	_____
e. discuss expectations	_____	_____	_____
f. review goals approach	_____	_____	_____
g. standards of ethics and conduct	_____	_____	_____
h. work habits norm	_____	_____	_____
i. establish co-operative spirit	_____	_____	_____
j. training and teaching procedures	_____	_____	_____
k. discuss pride and quality needed	_____	_____	_____

5. Follow-up process

a. review and establish job profile	_____	_____	_____
b. review evaluation procedure	_____	_____	_____
c. establish 2-way communication	_____	_____	_____
d. check on progress	_____	_____	_____
e. discover problem areas	_____	_____	_____
f. encourage creativity and participation	_____	_____	_____
g. check with buddy and trainer for progress and problems	_____	_____	_____
h. assign or establish what further actions are needed	_____	_____	_____
i. other _____	_____	_____	_____

42

Project Planning and Management Series.

MANUAL - I Planning for Project Implementation
MANUAL - P Project Planning
MANUAL - M Project Management
MANUAL - PF Pioneer Farm Implementation Planning

MODULES

1. Defining Project Objectives (Objective Trees)
2. The Logical Framework
3. Work Breakdown Structure
4. Activity Description Sheets
5. Project Organization
6. Linear Responsibility Charts
7. Project Scheduling - Bar Charts
8. Bar Charting for Project Control/Scheduling
9. Project Scheduling - Network Analysis
10. Milestones Description Charts
11. Resource Planning & Budgeting
12. The Role of PAMCO
13. Project Technology Analysis
14. Demand Analysis
15. Market Strategy Analysis
16. Project Area Analysis
17. Project Costs & Benefits
18. Project Profile
19. Financial Analysis
20. Cash Flow Analysis
21. Discounting
22. Net Present Worth Analysis
23. Cost-Benefit Analysis
24. Benefit-Cost Ratio Analysis
25. Internal Rate of Return
26. Social Analysis of a Project
27. Economic Analysis of Projects (including Border Pricing)
28. Financial Statements & Ratios
29. Project Selection & Ratios Analysis
30. Brainstorming
31. Decision-making System for Projects
32. Project Institutional Environmental Analysis
33. Ecological Analysis for Projects
34. Introduction to Contracts, Jamaican Contract Documents & Tendering Procedures
35. Selection & Use of Consultants
36. Project Documents for Planning & Implementation
37. Report Writing for Projects
38. Project Files
39. Formats for Pre-Feasibility & Feasibility Studies
40. Motivation of Employees and Personnel Evaluation
41. Design of a Project Management Control System
42. Evaluating & Forecasting Project Progress & Performance
43. Project Termination
44. Introduction to Lending Agencies
45. Organizing and Conducting Conference Meetings
46. Withdrawal of and Accounting for Loan Funds in the Financing of Projects