

**PURDUE UNIVERSITY**

**International Education and Research  
International Programs in Agriculture**



**PORTUGAL UNIVERSITY  
INSTITUTES  
DEVELOPMENT PROJECT**

**(Contract AID/NE-C-1701)**

**REPORT ON  
SHORT-TERM STAFF ASSIGNMENT**

**Submitted by  
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Clemson, South Carolina**

**May 9 through June 30, 1984**

PDAA 0085

PORTUGAL UNIVERSITY INSTITUTES DEVELOPMENT PROJECT  
(Contract AID/NE-C-1701)

REPORT ON  
SHORT-TERM STAFF ASSIGNMENT  
AT THE  
INSTITUTO UNIVERSITARIO DA BEIRA INTERIOR (IUBI)  
COVILHA, PORTUGAL

May 9 - June 30, 1984

Submitted by

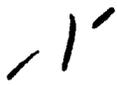
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## INTRODUCTION

This report covers the activities rendered as a part of the assistance to IUBI as required under agreements between the Government of Portugal and the Government of the United States of America and prime Contract No. AID/NE-C-1701 for the purpose of developing and strengthening the IUBI, formerly the polytechnical institute.

The activities consisted of teaching a course in human resource management, conducting a seminar in employee training and development, providing research assistance to the IUBI faculty, and visiting local firms and agencies.

## AREA OF CONSULTANCY

The major area of consultancy was Business Management, Personnel and Human Resource Systems. Specific areas covered were human resource planning systems; job analyses; the recruitment, selection and placement of qualified personnel in the firm; training and development; performance enhancement and review systems; and compensation systems.

## OBJECTIVES

Specific objectives of the seven-week consultancy were jointly developed by the advisor and the IUBI Rector, Prof. Dr. C. M. Passos Morgado. These covered three major areas:

1. Assist in the professional development of IUBI faculty by:
  - (a) Assisting and encouraging management faculty members in their efforts to obtain advanced degrees,
  - (b) Teaching a graduate-level course in human resource management, and
  - (c) Recommending a program for the acquisition of library journals to support faculty in advanced studies in management.
2. Assist in the development of scholarly research among faculty members by:
  - (a) Identifying research projects for future study,
  - (b) Recommending methods for conducting human resource management research projects, and
  - (c) Assisting faculty members in collecting and analyzing data and in writing research reports.
3. Assist in strengthening the ties between IUBI and surrounding business by:
  - (a) Conducting a seminar in human resource management, and
  - (b) Visiting local firms and agencies.

#### COUNTERPARTS

The short-term advisor was fortunate in having several very competent counterparts in the Management Department to assist in the consultancy. Helder Jacome took care of class logistics and administrative matters. Joao Lisboa and Alberto Pereira assisted with the seminar and plant visits. All of these individuals did outstanding

jobs and deserve credit for helping to make the consulting period a success.

Common research interests were discovered between the advisor and Antonio Pinto Serra, and plans were begun for conducting joint research projects.

#### SUMMARY OF ACTIVITIES

##### A. Graduate Course

Taught a section of Clemson University's Management 816, "Human Resources Management," attended by IUBI faculty members. Classes met 2-3 times weekly for a total of 42 student contact hours.

##### B. Seminar

Conducted a seminar in "Employee Training and Development" which covered new concepts in the determination of training needs, design of effective training programs, and the analysis of the results of training efforts. A workshop for managers was held in the afternoon session. A total of 16 participants attended.

##### C. Meetings Attended

1. Meeting with the Secretary of State and IUBI staff at IUBI. Future plans for the institute were presented and discussed. Short-term advisor met with the Secretary and his staff and explained the purpose and scope of short-term advisor's activities.

2. Interview with officials of the Instituto do Emprego e Formacao Profissional, Covilha district. Held a joint meeting with

the director and associate director of this government's employment and reporting agency. Discussed employment in Portugal and particularly in the textile industry in Covilha and the surrounding area. Short-term advisor (STA) obtained employment reports and statistical compilations. This center, located only one block from IUBI could serve as an important data base for IUBI faculty who wish to undertake research studies in employment trends and developments.

3. Fourteenth Annual Meeting of the Association of Portuguese University Personnel in Vila Real. STA met personnel from other universities, including rectors of the other institutes, and discussed the Purdue/Clemson AID project with them.

#### D. Plant Visits

1. Sofal Manufacturing Co., Tortozendo. This is a fully integrated textile and garment company. STA was given a complete tour of the facility and discussed employment problems with the plant manager, Sr. Vasco Pontifice.

2. Government Wool Laboratory, Covilha. STA toured this facility where wool quality is determined through various testing procedures, and talked with officials.

A complete chronology of activities by week is given in Appendix G.

## SUMMARY OF ACCOMPLISHMENTS

The first objective, assisting the professional development of IUBI management faculty, was accomplished through teaching the graduate level human resource management course and by laying the groundwork for the later acquisition of library journals to support advanced study. Nine faculty members participated in the course. Appendix A of this report is an outline of the topics covered and Appendix B lists course participants and their final grades. Appendix C contains a copy of a memo sent to Rector Morgado regarding library journals to support faculty studies.

The second objective, assisting faculty research efforts, was accomplished by identifying possible research topics in human resource management and discussing with faculty members methods of collecting and analyzing data and reporting results. A list of research topics is contained in Appendix D of this report. The STA also donated four reference works to be placed in the IUBI library. These are listed in Appendix E.

The third objective, strengthening ties between IUBI and area businesses was accomplished by conducting the seminar, "Employee Training and Development," and by visits to textile plants and the local employment service. Managers who attended the seminar, which was presented in both English and Portuguese, expressed interest in human resource management concepts and in further discussion of employment-related problems. Appendix F contains seminar announcements and handouts.

## RECOMMENDATIONS

1. Concerning the first objective--the professional development of IUBI faculty.

A great amount of progress has been achieved toward the goal of having a professionally qualified faculty of Management. Funds have been available for supporting foreign study toward advanced degrees and these funds have been well spent. To date, six Management faculty members are in the final stages of master's degree study.

One limitation in achieving the goal of a fully qualified faculty is the existence of a seven-year legal time limit that prohibits the continued employment of faculty members who have not obtained advanced degrees. Because of the continuing rapid growth of the institute, it is suggested that IUBI continue to concentrate its development efforts on those faculty members who have a reasonable expectation of finishing the required degrees within the legal time limits.

As faculty members become qualified at the master's degree level, increased attention is being directed toward developing a system to provide opportunities for study toward the Ph.D. degree. Considering the length of time required to obtain the Ph.D., full financial support to pursue these degrees at foreign universities would be quite costly. Two alternative plans that seem more practical are:

- a) Grant leaves of absence to faculty members who wish to study for the Ph.D. abroad and allow them to receive graduate assistantships to support them while in residence at the foreign university. Such assistance is widely available in the U.S.

- b) Develop a system whereby faculty would pursue independent study toward the Ph.D. with assistance and advice from professors at foreign universities. Degrees would be granted by the Portuguese university system through already existing procedures.

Discussion of these and other alternatives should be continued until a satisfactory program to support Ph.D. study can be developed.

2. Concerning the second objective -- assisting faculty research.

Time limits of the consultancy period prohibited carrying out entire research projects during the STA's visit. Significant progress was begun, however. At least one joint research project, and perhaps two others will be pursued by IUBI faculty members and the STA.

3. Concerning the third objective -- strengthening contacts with industry.

Human resource management has not, to date, been treated as a distinct management function in Portuguese industry. Some reporting aspects exist, but the full development of human resource management systems has not been undertaken in many sectors. A great deal of interest in the area was expressed by all of the managers and employment officials contacted by the STA, however, and the response to the training and development seminar was very encouraging.

For these reasons, it is recommended that IUBI Management faculty offer additional seminars to discuss human resource systems. A number of subjects from the course that was taught could be used as seminar topics. This would serve not only to strengthen ties between

IUBI and the business community, but could also provide opportunities for the faculty to conduct research in local firms.

Another way that ties between IUBI and the business community could be strengthened is through the establishment of an industrial advisory board. Representatives of local firms and public agencies could meet two or more times per year to discuss the institute's programs and curricula and to investigate the needs of industry for qualified graduates with certain skills, etc. Clemson University's Department of Management has such a board and, although it has been in existence only one year, it has already proven to be a significant step toward bringing the faculty and industry representatives together.

Strong ties already exist between the local textile industry and the IUBI textile department. Perhaps as the management faculty develops professionally, its ties with local firms and agencies can be expanded and strengthened in these and in other ways. This is an area where faculty members should take the initial steps to assure local business leaders that the faculty has important knowledge and expertise to offer that can aid firms in the area.

**APPENDIX A**

**Human Resources Management**

**Course Outline**

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# HUMAN RESOURCES MANAGEMENT

## Course Outline

May 15 - June 30

Dr. David W. Grigsby

### Course Description

The course will cover theory, research, and applications in the human resources area. Recent developments in the field will be emphasized.

### Objectives

This course should provide participants with:

- an understanding of the nature of human resources and their management in business and public sector organizations,
- a review of management theory associated with human resources and an examination of new ideas emerging from human resources research,
- an appreciation for the unique role of human resources as a factor of production and its relationship with other factors,
- the necessary knowledge and background to teach undergraduate courses and management seminars in human resources management.

### Reading Materials

The instructor will provide specific reading assignments upon his arrival. In preparation for the course, participants are requested to review basic principles of management texts.

### Topical Outline

The following topics will be covered in the course:

1. Human Resources Planning: The process of translating organizational goals into staffing requirements; organization and human resource information systems; projecting human resource needs.
2. Work Design: Productivity and effective job design; job description; job enlargement and job enrichment.
3. Recruitment and Selection: Planning and operating an effective employee recruitment system; selection and placement of individuals within the organization.
4. Training: Techniques and principles of on-the-job, classroom, and apprentice methods; training theory and behavioral training techniques.

5. Employee Motivation: Theories of motivation; application of motivation principles in employment; worker participation and delegation of authority.
6. Performance Appraisal: Techniques and processes in effective performance appraisal; trait, behavioral, and outcome measures and their uses.
7. Performance Improvement: Principles and theories of progressive discipline; design of discipline systems for performance enhancement.
8. Compensation Systems: Theories of pay and performance; traditional, incentive, and mixed compensation plans; job evaluation.
9. Communication: Theories and principles of organizational communication; networks and channels; effective oral and written communication.
10. Group Processes: Group dynamics and decision-making; theories of formal and informal group behavior.
11. Leadership: Theories of leadership and leader behavior; sources of organizational power and authority; delegation of authority.
12. Conflict Management: Handling interpersonal and intergroup conflict in organizations; theory and practice of integrative dispute resolution.

**APPENDIX B**

**Course Participants and Final Grades**

COURSE PARTICIPANTS AND FINAL GRADES

The following IUBI faculty members were students in Management 816,  
Human Resources Management:

<u>Name</u>	<u>Final Grade</u>
Alberto Ferreira Pereira	Inc.
Anna Maria Ussmane	B
Antonia Pinto Serra	W
Fidelino Barata Saraiva	(audit)
Helder J. Lopes Jacome	A
Joao V. Lisboa	Inc.
Maria Margarida Baptista	A
Mario Lino Raposo	A
Octavio Felix de Oliveira	W

Incomplete grades for Alberto Pereira and Joao Lisboa resulted from the necessity for these students to return to the U.S. before the final exam. Grades will be completed in Clemson in August.

APPENDIX C

Memo to Rector Morgado

Recommended Journals for Library Acquisition

MEMORANDUM

TO: Rector Morgado  
FROM: David Grigsby, AID advisor  
DATE: June 28, 1984  
SUBJ: Recommended journals for library acquisition.

I have completed my analysis of IUBI library needs to support independent advanced degree study as you requested in our meeting of May 17.

A number of very good journals are already subscribed to by the IUBI library and should aid advanced studies. For example, the Harvard Business Review (French edition) and the Journal of Business. With the addition of just five journals, I believe the library could be considered adequate for the general study of management. These five journals are:

The Academy of Management Journal  
The Academy of Management Review  
California Management Review  
Decision Sciences  
The Journal of Management

To support specialized areas of Ph.D. study, such as Production and Operations Management, or Organizational Behavior and Personnel, would require the purchase of several specialized journals in each of these areas. I suggest that you wait and see which speciality areas your faculty undertakes for Ph.D. study before committing funds to these. Another suggestion would be to arrange for the faculty members pursuing Ph.D. study to visit the library of the Technical University of Lisboa on a regular basis, where many of those journals can be found.

IUBI library journals are already adequate to support specialized advanced study in Operations Research and in Economics, except perhaps for back issues, which could be obtained from Lisbon by inter-library loan as needed.

I would also recommend the addition of some basic journals in the areas of Finance, Marketing, and Accounting, since these would add support to the general study of Management. If you wish, I could forward a short list of those journals to you after my return to Clemson.

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Although I did not undertake a comprehensive review of all of the library's bound volumes, I did note that you have a fine collection of books in the area of organizational behavior and human motivation. A faculty member choosing that area of Management study would have the advantage of ready access to a number of classic references such as Victor Vroom's Work and Motivation (1965).

I am also leaving the library four basic references in the area of human resources management that I brought with me. These should serve as a source for further references in that area of study.

**APPENDIX D**

**Suggested Research Topics in Human Resources Management**

## SUGGESTED RESEARCH TOPICS IN HUMAN RESOURCES MANAGEMENT

1. An analysis of recent employment trends in the Portuguese textile industry.
2. Labor displacement in the Portuguese textile industry.
5. Employment, training and employee development in the Portuguese textile industry.
4. Cross cultural differences in motivation need strength: Portuguese and American assessment utilizing the Job Choice Exercise.
5. Analysis of employee motivation programs in the absence of monetary rewards.
6. The manager's role in a legally restricted labor market: The Portuguese experience.

**APPENDIX E**

**Reference Works Submitted to IUBI Library**

REFERENCE WORKS SUBMITTED TO IUBI LIBRARY

French, Wendell L. The Personnel Management Process, fifth edition.  
Boston, Mass.: Houghton-Mifflin Co., 1982.

Gleuck, William F. Personnel: A Diagnostic Approach, third edition.  
Plano, Texas: Business Publications, Inc., 1982.

Heneman, H.G., D. P. Schwab, J. A. Fossum, and L. D. Dyer. Personnel  
and Human Resources Management, revised edition. Homewood, Ill.:  
Richard D. Irwin Co., Inc., 1983.

Rowland, K. M. and G. R. Ferris. Personnel Management. Boston, Mass.:  
Allyn-Bacon, Inc., 1982.

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**APPENDIX F**

**Seminar Announcements and Outlines**

INSTITUTO UNIVERSITARIO DA BEIRA INTERIOR

COVILHÃ



SEMINÁRIO SOBRE  
"IMPLEMENTAÇÃO DE UM  
PROGRAMA DE FORMAÇÃO  
DE PESSOAL"

15 DE JUNHO DE 1984

NORMAS E INDICAÇÕES SOBRE O SEMINÁRIO:

o INSTITUTO UNIVERSITÁRIO DA BEIRA INTERIOR,  
promove através do DEPARTAMENTO DE GESTÃO:

SEMINÁRIO SOBRE  
"IMPLEMENTAÇÃO DE UM  
PROGRAMA DE FORMAÇÃO  
DE PESSOAL"

que se realizará no dia 15 de Junho de 1984,  
das 9H30' às 16H30, de acordo com as seguintes  
condições:

1. Poderão inscrever-se todos os interessados  
no domínio das modernas técnicas de ges-  
tão
2. O preço de inscrição é de 1.000\$00 e dará  
direito para além de participação na ses-  
são, à recepção de documentação e café.
3. O valor da inscrição tem de ser enviado  
juntamente com o envio do boletim.

O PERÍODO DE INSCRIÇÕES TERMINARÁ A 12 DE JUNHO INCLUSIVE.

CONTACTAR A SRA D. MARIA MANUEL - TELEFONE (075)25141/2/3/4 DAS 9H30 AS 12H30 E DAS  
14H30 AS 17H30, PARA EFEITOS DE INSCRIÇÃO E EVENTUAIS ESCLARECIMENTOS

INSTITUTO UNIVERSITÁRIO DA BEIRA INTERIOR  
RUA MARQUES DE AVILA E BOLAMA  
6200 COVILHÃ

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NOME: \_\_\_\_\_

\_\_\_\_\_

EMPRESA/INSTITUIÇÃO: \_\_\_\_\_

\_\_\_\_\_

CATEGORIA PROFISSIONAL: \_\_\_\_\_

\_\_\_\_\_

NOME: \_\_\_\_\_

\_\_\_\_\_

EMPRESA/INSTITUIÇÃO: \_\_\_\_\_

\_\_\_\_\_

CATEGORIA PROFISSIONAL: \_\_\_\_\_

\_\_\_\_\_

PREÇO DA INSCRIÇÃO: 1.000\$00

OBS: SERÁ FORNECIDO AOS PARTICIPANTES TODA A DOCUMENTAÇÃO EM PORTUGUÊS. NO PERÍODO DE PERGUNTAS E RESPOSTAS, FUNCIONARÁ UM SISTEMA DE TRADUÇÃO P/QUEM NÃO DOMINAR A LÍNGUA INGLESA

PROGRAMA

9H30 - AS NECESSIDADES DE FORMAÇÃO DE PESSOAL

COMUNICAÇÃO: PROF.DR.DAVID GRIGSBY (UNIVERSIDADE DE CLEMSON U.S.A.)

INTERVALO PARA CAFÉ

11H15 - DESENVOLVIMENTO DE UM PROGRAMA DE FORMAÇÃO

COMUNICAÇÃO: PROF.DR.DAVID GRIGSBY (UNIVERSIDADE DE CLEMSON U.S.A.)

ALMOÇO

14H00 - AVALIAÇÃO DO PROGRAMA DE FORMAÇÃO

COMUNICAÇÃO: PROF.DR.DAVID GRIGSBY (UNIVERSIDADE DE CLEMSON U.S.A.)

INTERVALO PARA CAFÉ

15H15 - WORKSHOP

Exm<sup>o</sup> Senhor

SI referência

SI comunicação

NI referência

COVILHA

DGE/

ASSUNTO: Seminário sobre " Implementação de um programa de formação de pessoal " pelo Prof. David Grigsby da Universidade de Clemson (U.S.A.)

No seguimento de anteriores realizações, o Departamento de Gestão e Economia do Instituto Universitário da Beira Interior, vai realizar no próximo dia 15 de Junho de 1984 um Seminário sobre " Formação de pessoal " do qual se junta folheto divulgativo.

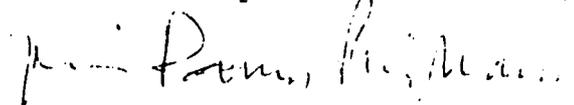
O Seminário será conduzido em Inglês, com tradução simultânea e orientado pelo Prof. David Grigsby da Universidade de Clemson, especialista em Gestão de Pessoal.

A importância, a oportunidade do tema e a incidência que a formação de pessoal tem não só no estabelecimento de um ambiente sociável, mas também na melhoria da produtividade da empresa, justificam a realização deste Seminário.

Agradecendo desde já a atenção dispensada, queira V.Exa. aceitar os nossos cumprimentos.

De V. Exas.

O Coordenador do Dep. Gestão e Economia,



J. Ramos Pires Manso

FP/IC



CONVITE

O Departamento de Gestão do I.U.B.I., convida todos os interessados a participar na Jornada de Trabalho subordinada ao tema " Implementação de um programa de formação de pessoal ", a realizar neste Instituto Universitário no dia 15 de Junho de 1984.

PROGRAMA

- 9:30 - 11:00 - A NECESSIDADE DE FORMAÇÃO DE PESSOAL
- 1 - Análise da organização
  - 2 - Análise de funções
  - 3 - Objectivos de formação
- 11:00 - 11:15 - Intervalo para café
- 11:15 - 12:30 - DESENVOLVIMENTO DE UM PROGRAMA DE FORMAÇÃO
- 1 - Bases teóricas da formação
  - 2 - Métodos de formação no local de trabalho
  - 3 - Métodos de formação fora do local de trabalho
- 12:30 - 14:00 - Intervalo para almoço
- 14:00 - 15:00 - AVALIAÇÃO DO PROGRAMA DE FORMAÇÃO
- 1 - Critérios de avaliação
  - 2 - O processo de avaliação
  - 3 - Determinação da sua validade
  - 4 - Transferência para o local de trabalho
- 15:00 - 15:15 - Intervalo para café
- 15:15 - 16:30 - WORKSHOP

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## SEMINÁRIO:

Implementação de um Programa de Formação de Pessoal

Junho 15, 1984

Instituto Universitário da Beira Interior - Covilhã

### PRIMEIRA PARTE

#### Determinação das Necessidades de Formação

##### I. INTRODUÇÃO

##### II. ANÁLISE DA ORGANIZAÇÃO - " Em que área da organização é necessária a formação ? " .

###### A. Determinar objectivos da organização e da unidade de trabalho

1. Missão da organização
2. Objectivos por departamento
3. Objectivos por unidade de trabalho

###### B. Analisar realizações da organização

1. Registos da produção
2. Registos de pessoal
3. Observação
4. Reuniões com supervisores
5. Entrevistas com trabalhadores

###### C. A partir da análise determinar que unidades de trabalho possuem problemas em alcançar os objectivos.

###### D. Exemplos

##### III. ANÁLISE DE TAREFAS - " Que deve um indivíduo em formação aprender com vista ao desempenho do trabalho de um modo efectivo ? " .

###### A. Comparar níveis de realização no posto de trabalho versus " job description " .

###### B. Analisar áreas de incumprimento para determinar tendências ou padrões.

###### C. Determinar se os padrões de incumprimento sugerem déficits de apti-

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dão ou problemas de motivação.

D. A formação é recomendada no caso de déficits de aptidão serem observados.

E. Exemplos.

## SEGUNDA PARTE

### Implementação de Programas de Formação

#### I. TEORIA BÁSICA DE INSTRUÇÃO

A. Aprendizagem e importância da sua determinação

B. O ambiente da formação

1. Condições de prática
2. Feedback
3. Significado do material
4. Diferenças individuais
5. Modular o comportamento
6. Manter a motivação

C. Retenção e transferência da aprendizagem

1. Maximizar semelhança entre formação e situações reais do posto de trabalho.
2. Proporcionar variedades de exemplos (conceitos).
3. Proporcionar oportunidades de experiências com tarefas ensinadas.
4. Identificar aspectos importantes das tarefas.
5. Princípios gerais a serem observados para que ocorra a transferência.
6. Assegurar recompensa no local de trabalho.
7. Conceber a formação por forma a que o indivíduo a ela sujeita possa ver a sua aplicabilidade.
8. Uso de questões adicionais para orientar a atenção dos indivíduos em formação.

II. MÉTODOS DE FORMAÇÃO NO LOCAL DE TRABALHO - Vantagens, Desvantagens e aplicações de cada.

A. Formação no posto de trabalho.

B. Formação de aprendizes.

C. Treino.

III. MÉTODOS DE FORMAÇÃO FORA DO LOCAL DE TRABALHO - Vantagens, desvantagens e aplicações de cada.

- A. Lições
- B. Auxílio de meios audiovisuais.
- C. Instrução programada
- D. Instrução assistida com computadores.
- E. Simulação de equipamento.

IV. ANÁLISE INDIVIDUAL - " Quem necessita de formação e de que tipo ? ".

- A. Determinar que trabalhadores necessitam de formação.
  - 1. Relatórios dos supervisores.
  - 2. Check-ups dos conhecimentos requeridos pelo posto de trabalho.
  - 3. Relatórios de produção.
- B. Determinar tipo de formação necessário.
  - 1. Formação inicial do posto de trabalho.
  - 2. Reciclagem
- C. Exemplos

V. REDIGIR OBJECTIVOS DE FORMAÇÃO.

- A. Início com problemas básicos
- B. Traduzir problemas básicos em questões relacionadas com o comportamento do trabalhador.
- C. Um bom objectivo é:
  - 1. definido em termos de comportamento
  - 2. observável
  - 3. quantificável
  - 4. definido em termos de tempo.
- D. Exemplos.

TERCEIRA PARTE

Avaliação de Programas de Formação

I. MEDIDAS DA EFICIÊNCIA DA FORMAÇÃO.

- A. REAÇÃO - mede o que os participantes pensam sobre vários aspectos do programa de formação, tais como:

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1. Uso de meios auxiliares de ensino.
  2. Aptidão do instructor.
  3. Intensidade das tarefas de formação.
  4. Realização dos objectivos de formação.
  5. Aplicação à situação real de emprego.
- B. ENSINO - mede os conhecimentos e capacidades obtidas no programa de formação. Referem-se dois tipos:
1. Testes de conhecimentos: reconhecimento e lembrança de factos.
  2. Testes práticos: demonstração de procedimentos aprendidos.
- C. COMPORTAMENTO - em que medida o indivíduo saído da formação aplica o que aprendeu ao voltar ao seu posto de trabalho. Exemplos:
1. Observação pelos supervisores.
  2. Questionários completados pelos subordinados, por pessoas do mesmo nível ou por superiores.
- D. RESULTADOS - mede eficiência da formação em termos de custo actual/resultados ou de comportamento, tais como:
1. Aumento de vendas ou proveitos.
  2. Aumento da quantidade ou qualidade da produção.
  3. Redução de rotação de pessoal ou absentismo.
  4. Redução da taxa de acidentes.
  5. Redução da taxa de abandonos.

## II. CONCEPÇÃO DE UM ESTUDO DE AVALIAÇÃO DA FORMAÇÃO.

### A. Métodos dos Casos

Formação —→ avaliação após formação  
(de difícil interpretação devido a explicações alternativas de resultados).

### B. Métodos Pretest - Posttest

Avaliação antes da formação —→ Formação —→ avaliação após a formação  
(são usadas avaliações prévias para determinar a grandeza do efeito da formação).

C. Métodos do Controle de Grupos Pretest - Posttest

Grupo I : Avaliação antes da formação → Formação → Avaliação após a formação

Grupo II : Avaliação antes da formação → ----- → Avaliação após a formação

(controle de grupos é usado para determinar os efeitos da formação versus explicações alternativas).

D. Estudos Múltiplos Base - Linha

Diversas variáveis são medidas ao longo do tempo para determinação dos efeitos/resultados da formação sobre o posto de trabalho ou resultados.

Exemplo: dados de comportamento do pessoal de mercearia.

# CONVITE

O Departamento de Gestão do I.U.B.I., convida todos os interessados a participar no Seminário subordinado ao tema "IMPLEMENTAÇÃO DE UM PROGRAMA DE FORMAÇÃO DE PESSOAL", a realizar neste Instituto, no dia 15 de Junho de 1984.

## PROGRAMA

9H30 - AS NECESSIDADES DE FORMAÇÃO DE PESSOAL.  
Prof. Dr. David Grigsby (Univ. de Clemson-USA)

INTERVALO PARA CAFÉ

11H15 - DESENVOLVIMENTO DE UM PROGRAMA DE FORMAÇÃO.  
Prof. Dr. David Grigsby

ALMOÇO

14H00 - AVALIAÇÃO DO PROGRAMA DE FORMAÇÃO.  
Prof. Dr. David Grigsby

INTERVALO PARA CAFÉ

15H15 - Workshop.

APPENDIX G

Weekly Chronology of Activities

## WEEKLY CHRONOLOGY OF ACTIVITIES

### Week of May 13-19

Met with Prof. J. R. Davis, departing STA on Monday and discussed the institute and advisor's role. Had meetings with Rector Morgado on Tuesday and Thursday to discuss objectives of the consultancy and his expectations. Met with counterpart Helder Jacome on Monday and Tuesday to coordinate administrative details. Held an organizational meeting of the human resource management class on Tuesday in which a schedule was arranged that would meet Clemson University graduate school requirements. The first class meeting was held on Thursday. Friday was spent preparing class material and attending a seminar on the problems of the Portuguese economy presented by visiting professors.

### Week of May 20-26

Prepared lessons and taught human resource management course. Began preparation of the seminar in training and development to be held June 15. Announcements were developed, translated to Portuguese by IUBI counterparts, and mailed to area businesses on Friday. On Friday, STA attended a meeting of the IUBI staff with the Secretary of State of Portugal, Sr. Joachim Pinto Machado, and members of his staff. Saturday was spent in Vila Real attending the 14th Annual Meeting of the Association of Portuguese University Personnel.

### Week of May 27 - June 2

Prepared lessons and taught course. Began developing seminar outline for translation. On Friday, visited Sofal Manufacturing Company in Tortozendo and discussed human resource management with company officials. Sofal is a fully integrated textile and clothing manufacturing company.

### Week of June 3-9

Prepared lessons and taught course. Completed handouts for June 15 seminar. On Tuesday, visited the Employment Center of the Institute of Employment and Training for the region of Castelo Branco and Covilha, where we held a joint interview with the director, Sr. Fonseca and assistant director, Sr. Mesquita. Discussion, which lasted nearly two hours, centered on Portuguese and U.S. employment, training, legal restrictions in the labor market, and the employment situation in the local area. STA obtained statistical employment reports for further study.

Week of June 10-16

Prepared lessons and taught course. Discussed possible research projects with IUBI faculty member Joao Lisboa, Alberto Pereira and Antonio Pinto Serra. Held "Employee Training and Development" seminar on Friday, which was attended by area managers and some IUBI faculty and staff members. Began developing a list of management journals to recommend to IUBI library for support of faculty research.

Week of June 17-23

Prepared lessons and taught course. Began writing final report.

Week of June 24-30

Completed journal list for IUBI library and forwarded recommendations to Rector Morgado. Held final class meetings and graded exams. Completed draft of final report of activities.

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