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SEMINAR COMPLETION REPORT
TRAINING OF TRAINERS IN MANAGEMENT

LISBON, PORTUGAL

JUNE 16 - JULY 11, 1980

Submitted to:

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SECTION I

EXECUTIVE SUMMARY

A. INTRODUCTION

A Seminar in the Training of Trainers in Management (TTM) series was conducted in Lisbon, Portugal, at the Training Center of NORMA, Inc., a management consulting and training corporation. The Seminar was presented by Practical Concepts Incorporated under terms of contract AID/SOD/it-C-0006 with the Agency for International Development. The TTM was followed by a brief "satellite" session for the Ministry of Agriculture and Fishing, involving course graduates.

The TTM Seminar had several complementary objectives including:

- instruction of senior and middle level managers from public and private sector organizations in key management principles and practices;
- creation of additional demand and appreciation for improved management skills on a "spread effect" basis in the Portuguese managerial cadre;
- demonstration of the utility of the TTM-type approach for providing such skills; and,
- partial institutionalization within NORMA of the ability to carry out comparable seminars in the future.

The Seminar began officially in Lisbon on June 16, and was completed on July 11, 1980. All participants were Portuguese, and the Seminar was conducted in English. The Seminar used the normal TTM instructional modes of classroom lectures and workshops. In addition, two working site-visits were integrated into the overall course as a basis for practical experience in "formative evaluation" and "organization problem diagnosis" procedures. The organizations visited were the Sagres-Carlsberg Brewery and the Lisnave Shipbuilding and Drydock Facility, both in the greater Lisbon region. Each enterprise represents the largest or one of the largest facilities of its type in the world, and the

unstinting cooperation of senior management in both cases is here gratefully acknowledged.

The Seminar opening ceremonies included remarks by Dr. Remy Freire, President of NORMA, Donald Finberg, USAID Mission Director in Portugal, and Leon J. Rosenberg, President, Practical Concepts Incorporated. Closing ceremonies featured congratulatory statements by the same speakers.

B. PARTICIPANTS

There were a total of 29 participants who began the four-week Seminar, of whom one was required to withdraw due to illness in the second week. Of those completing the course, 25 were male and 3 were female.

Among the total participant group, the largest single sub-category was composed of 13 members of the staffs of Portuguese universities and graduate faculties, in most cases representing the Economics, Business and Management programs at leading universities as Coimbra, Lisbon and Porto. The second largest sub-group, numbering 11, represented senior and mid-level managers of line organizations, of whom 6 were drawn from business enterprises and 5 from government ministries. Finally, 4 individuals engaged in active management consulting practice also participated. (See Appendix A for further details.)

At the beginning of the Seminar a "Needs Assessment" questionnaire was administered. The individual topical areas which the largest number of participants indicated they must learn included:

	<u>Number</u>	<u>Percentage</u>
Defining project objectives and priorities	22	78%
Managing activities of large organizations	21	75%
Planning program/project costs, time schedules & operations	18	64%
Identifying future development (and organization) problems	17	61%

In addition, the participants, were most interested in learning about:

	<u>Number</u>	<u>Percentage</u>
Managing activities of large organizations	20	71%
Defining project objectives and priorities	20	71%
Conducting field program	19	67%
Training project staff	17	61%
Planning program/project costs, time schedules and operations	17	61%

After analysis of the above similar responses, several adjustments to the preliminary course curriculum were made (See Appendix B). The changes included greater emphasis on:

- management by objectives
- organization diagnosis and problem correction
- "matrix management", or the use of project team techniques to strengthen organization performance
- general management science and organization theory literature
- intensive support for preparation of viable back-home projects.

C. ACHIEVEMENTS

This Seminar, although part of a longer series of such courses conducted during recent years by PCI, was distinguished by the high level of education and technical competence brought to the course by the Portuguese participants. In the immediate experience of the training team leader, extending over some seven TTM and EMS (Executive Management Seminar) courses, no other participant group approached the present one in terms of overall intellectual quality. At the same time, the degrees of individual motivation for achievement in the course were comparable to the very highest levels reached in only one or two other cases.

The combination of these two attributes of exceptional abilities and intense commitment resulted in a truly outstanding Seminar in the unanimous judgment of the training team and a number of observers. On the one hand, it proved possible to compress the main elements of the standard TTM curriculum into the abbreviated period of four weeks while yet providing room for the addition of further materials. On the other hand, the team is in total agreement that never had greater intellectual and pedagogical demands been made upon them on so intensive a basis. In the latter regard, the course quickly assumed the characteristics of an advanced graduate school seminar, although conducted daily for eight hours straight over an entire month! (Section II below returns to these issues for further assessment of both achievements and areas for possible future improvement.)

All participants graduated from the Seminar and were awarded two certificates on July 11, 1980. These included USAID Certificates for course completion, and PCI certificates documenting achievement in the use and training of Logical Framework and related Project Management Systems.

Seminar staff assessments and other data indicated that basic LogFrame concepts and techniques were thoroughly mastered by all participants. In addition, the overwhelming majority of participants achieved, at a minimum, strong conceptual knowledge in problem diagnosis techniques, feasibility analysis, matrix management, and human factors/team building topical areas.

With regard to post-Seminar use of the course materials, a primary focus throughout had been rigorous preparation of individual back-home project designs. All of these designs were explicitly conceived as bridges back to the individuals' organization environments, and in every instance individuals displayed sincere commitment to timely implementation. Many of these individual projects were scheduled to begin immediately and informal contacts since course completion suggest this has in fact occurred. In addition, at the request of the USAID Mission Chief a six-month follow-up evaluation questionnaire was prepared, which will supply extremely useful data on the eventual results of these back-home project efforts.

D. PARTICIPANT EVALUATION OF TTM SEMINAR

The participants were asked to evaluate the Seminar on the last day. Results are presented in Appendix C. In general, the comments were positive and comparable to the most positive in any proceeding TTM Seminars using the same evaluation instruments.

Topics found most interesting were:

Logical Framework	(75%)
Creative Problem Solving	(58%)
Human Factors	(54%)
Performance Networking	(44%)

Topics found most useful were:

Logical Framework	(86%)
Creative Problem Solving	(64%)
Back-home Project	(50%)
Performance Networking	(47%)

Topics found least useful were:

Practical Training	(14%)
Communication	(7%)

(on this item 11 participants said none of the topics was "least useful"!)

SECTION II

SEMINAR REVIEW

A. SPECIAL FEATURES OF THIS SEMINAR

A number of conditions which prevailed for this Seminar, only some of which were known in advance, shaped the particular forms and degrees of achievement, and make inferences regarding future seminar practice a matter for careful assessment. Among the most significant of these distinctive features were:

- the requirement to offer the Seminar in a four-week format;
- the requirement to conduct the TTM for the first time on a non-residential basis;
- the requirement to conduct the course in English, although it was known that some participants had only limited fluency in this language;
- the particular characteristics of the participant group, i.e. their heavy representation of line manager and academic occupations, and their very high levels of professional and educational achievement; and,
- the unusually favorable opportunity for using major local organizations as cooperating institutions, and as sites for direct application of newly acquired skills.

Each of the above factors was accommodated by customizing the standard TTM format in one fashion or another. The main types of adjustment and the results are discussed briefly below.

The first three factors together set unusually demanding conditions for conduct of a TTM with the appropriate degree of success regarding transfer of learning objectives. The shorter time period, the inability to achieve "total immersion" as a result of using a residential format, and finally the use of English despite the limited capacity of some participants in this language, all converged to compel the training team to make structural and impromptu

adjustments. The most basic of these was a very careful pruning of the curriculum to retain all of the core elements, while yet leaving some time for specific topical additions as appropriate to participant desires. This trimming process was accompanied by adoption of the device of evening seminar workshops on a voluntary basis, which were invariably well attended, and which allowed for reinsertion of many of the games, exercises, case studies and less critical lecture topics that otherwise would not have been covered. To complement these measures, the team addressed the language problem by particularly careful attention to lecture style and diction, by translation into Portuguese of a number of a major "hand-outs", by recourse to Spanish when specific problems seemed to surface, by close monitoring of the 3 or 4 participants with the most serious limitations in English, by allowing participant presentations to be made in Portuguese when necessary, and perhaps most importantly, by establishment of a French language workshop group where lecture and workshop materials were addressed in this alternative language. As a combined result of all of these expedients, there developed a consensus among participants and trainers that the language of instruction was not a serious obstacle to course success, in this instance.

The particular configuration of participant attributes represented another set of factors that imposed constraints, while at the same time providing the most positive surprise for the training team once on-site. Due to advance notice that few if any of the participants were actually involved occupationally in "development project" activities in the conventional sense (but were instead line managers in large organizations of diverse types), a decision was made before the fact to alter the course emphasis somewhat by scaling down treatment of "development" projects as such.

This was matched by significantly greater emphasis on organizations and organization problem diagnosis and resolution, especially by means of using "matrix management" team approaches within such organizations. This revised orientation was well received generally as a realistic and practical way to make the TTM

tools directly relevant "back-home." As a corollary technique, the training team gave substantially greater emphasis and course time to individual "back-home" projects than is the usual case, since these were the immediate vehicle for applying the matrix management and project management tools, both during and immediately after the course. Finally, the participant attributes which provided the greatest positive surprise and no doubt the bases for overcoming every shortcoming of format, facilities, and training practice, were simply their superior intellectual resources and motivation. These made every aspect of the course proceed more rapidly and smoothly than anyone could have foreseen, while at the same time creating unprecedented demands for greater depth and theoretical rationale in the coverage of almost every major topic. The team felt and was formally and informally told that it met this challenge.

The final important feature of this Seminar that set it apart from others in the series reflected unusually fortunate opportunities to work with major local organizations, both during and immediately after the course. During the course, contacts made through participants in senior positions resulted in "red carpet" treatment full-day site visits to two very large industrial facilities. With prior and post-visit classroom processing, these yielded exceptionally effective empirical case study materials for application to several crucial topical units, namely organization problem diagnosis and remedial project design, and project "formative evaluation" techniques. As a result of these activities, PCI was asked to conduct a brief "satellite" session following the TTM. This second session was in response to an urgent request from the Ministry of Agriculture and Fishing to participate in a major program design effort, in which several course participants eventually played central roles (which may well recur in subsequent months).

B. IMPLICATIONS

Turning from description of special factors and means of dealing with them to broader implications for future TTM courses, we may be able to draw

several tentative conclusions on the basis of this and prior seminar experiences.

The first of these is to suggest that the attempt to conduct a standard TTM in four weeks with ordinary "third world" participants is likely to be a very high risk strategy relative to substantial practical skills transfer. This holds with especial force if for any reason the course cannot be offered on a residential basis. In the Portuguese case, only the superior intellectual qualities of the participants saved the day.

Another judgment that seems supported by the data is that the standard TTM core curriculum materials can be readily and meaningfully adapted for participant groups that are other than development project operatives as such. In the present case the large academic and organization management contingents asserted that the course as adapted was highly relevant to their requirements. The adaptations introduced featured, as indicated above, much greater theoretical depth and more explicit attention to line management functions/problem remedies. These adjustments did not require excessive additional investments in curriculum development. As it is normal PCI practice, the full-time team of trainers for this effort were highly competent professionals with considerable experience upon which to draw in the day-to-day tailoring process.

A last observation worth noting involves formal recognition of the decisive factor that good liaison with important local organizations can be in the overall success of the course. This element proved so significant in the present case that it seems to merit much more explicit integration into the TTM core curriculum and procedural scheme. At a minimum, it is here suggested that the site visit also be used to identify specific organizations and/or projects that can be visited during the seminar and serve as "live" case studies.

C. FOLLOW-UP

At the time of writing, follow-up procedures for this Seminar include a number of diverse elements. One of these represents an evaluation questionnaire, prepared at the request of the Mission Director, to be administered by USAID to all participants six months after the course. There is every reason to expect that useful data will be forthcoming from this source on the intermediate range impact of what was done in the course, and how it can be strengthened in the future.

A second avenue of follow-up involves preliminary discussions leading to conduct of another TTM under the same sponsorship before the end of 1980, most probably in Porto, and in association with its University Economics Faculty.

A third line of future activity is reflected in developing relationships between the TTM graduates and Lisbon based management consulting and training organizations. NORMA the host institution for this TTM, is looking to pursue future joint training and consulting projects using graduates of this course in a similar fashion.

Lastly, a satellite program was undertaken by Seminar training staff and participants immediately after the course in major program development efforts in the Ministry of Agriculture and Fishing. This could lead to continuing opportunities for TTM graduates in both training and consulting activities.

APPENDIX A: LIST OF PARTICIPANTS BY ORGANIZATION, TITLE/FUNCTION AND
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APPENDIX B: REVISED TTM AGENDA

- P = Plenary
- W = Workshop
- D.O. = Day's Objectives

REVISED AGENDA: TTM - PORTUGAL

- Y.R. = Yesterday in Review
- P.P. = Participant Presentatio.
- TGST = Two Groups Show and Tel

WEEK ONE

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
AM	Opening Ceremony (P)	D.O./Y.R. (P)	D.O./Y.R.	D.O./Y.R.	D.O./Y.R.
	Seminar Overview (P)	Overview of Project (P)	Puno Hierarchy of Objectives (P)	Assumptions & Manageable Interest (P)	Logic Diagrams (P)
	Logistics/Adminis- tration (P)	Management and Objectives (P)	of Objectives (continued)	Assumptions & Manageable Interest (W)	Logic Diagrams (W)
	ITM "Learning Guide"(P)	Management and Objectives (W)	Puno Hierarchy of Objectives (TGST) (W)	LogFrame Inputs (P)	Human Factors: Introduction (P)
	Dyad Introductions (P)	Management and Objectives (W)	Objectively Verifi- able Indicators (P)	LogFrame Inputs (W)	Human Factors (W)
PM	Seal Hunt Introduction (P)	Logical Framework: Hierarchy of Objectives (P)	Means of Verifi- cation (P)	Puno Vertical Logic, OVI's, MUV's (W)	Puno Team Presentations & Feedback (P)
	Seal Hunt Game (W)	Logical Framework: Hierarchy of Objectives (W)	Means of Verifi- cation (W)	Puno Verical Logic, OVI's MUV's (TGS1) (W)	Key Mgt. Problems Presentations (P)
	Seal Hunt Wrap-up (P)	Puno Case Intro- duction (P)	Key Management Problems Exercise (W)		Back-Home Projects: Intro- duction (P)
	Homework:	Puno Hierarchy of Objectives (W)			Week in Review (P)
	Needs Assessment Questionnaire (P)				
Bio-data Forms					

- P = Plenary
- W = Workshop
- D.O. = Day's Objectives

REVISED AGENDA: TTM - PORTUGAL

- Y.R. = Yesterday in Review
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- TGST = Two Groups Show and T

WEEK TWO

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
AM	D.O./Y.R./P.P. Problem & Objective Tree Analyses (P) Problem & Objective Tree Analyses (W) Feasibility Introduction (W) Feasibility Exercises (W)	D.O./Y.R./P.P. Implementation I (Monitoring/Reporting) (P) Implementation I (Monitoring/Reporting) (W) Matrix Management (P) Matrix Management (W)	D.O./Y.R./P.P. Personal LogFrames (W) Feasibility II (Probability) (P) Feasibility II (Probability) (W)	D.O./Y.R./P.P. From Trees to Logframe (P) Kelsin Vertical Logic (W) Evaluation Introduction (P) Evaluation Introduction (W)	D.O./Y.R./P.P. Feasibility III (Benefit/Cost) (P) Feasibility III (Benefit/Cost) (W) Implementation III (Management) (P) Site-Visit Analysis (W)
PM	Logic Diagrams II (P) Logic Diagrams (W) Motivation & Performance (P) Motivation & Performance (W)	Training I (P) Training (W) Back-Home Projects (W)	Creativity Exercises (Brainstorming) (W) Readings/Discussion (W)	Site Visit - Sagres Brewery	Back-Home Projects (TGST) (W) Seminar Feedback (Forum) (P) To be Announced Week in Review (P)

- P ■ Plenary
- W ■ Workshop
- D.O. ■ Day's Objectives

REVISED AGENDA: TTM - PORTUGAL

- Y.R. ■ Yesterday in Review
- P.P. ■ Participant Presenta
- TGST ■ Two Groups Show and

WEEK THREE

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
AM	D.O./Y.R./P.P Matrix Management II(P) Matrix Management II(W)	D.O./Y.R./P.P Feasibility IV (P) (Opportunity Cost) Feasibility IV (W) (Opportunity Cost) Implementation III(P) (Tools) Implementation III(W) (Tools)	D.O./Y.R./P.P Network Timing (W) Analysis - I Feasibility V (P) (Time Value of Money) Feasibility V (Time Value of Money)	D.O./Y.R./P.P Resource Allocation I(P) Resource Allocation I(W) Site Visit- Lisnave	D.O./Y.R./P.P LogFrame Critique (P) Checklist Matrix Management(P/ III Site-Visit (I) Analysis
PM	NASA Game (P) Back-Home Project (W) Team	Readings (W) Discussion Training II (P) Training II (W)	Prisoners Dilemma (W) Game Project Teams (W)	Site Visit - continued	Project Teams (I) Week in Review

06

P = Plenary
 W = Workshop
 D.O. = Day's Objectives

REVISED AGENDA: TTM - PORTUGAL

Y.R. = Yesterday in Review
 P.P. = Participant Presentat
 TGST = Two Groups Show and T

WEEK FOUR

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	D.O./Y.R./P.P.	D.O./Y.R./P.P	D.O./Y.R./P.P.	D.O./Y.R./P.P	D.O./Y.R./P.P
AM	Gantt Charts (P) Gantt Charts (W) Evaluation II (P) (6 Step Planning) Evaluation II (W) (6 Step Planning)	Feasibility (P) Wrap-up Project Teams TGST (W)	Organization Change(P) Organization Change(W)	Evaluation Design (W) Project teams (P) Final Presentations	Evaluation IV (P) Findings & Recommendations Evaluation IV (W) Findings & Recommendations Seminar Feedback (P) Discussion
PM	Individual Back-Home Projects (W) LogFrame as Contracting Tool (P)	Reading Presentation (P) Reading Discussion (W) Management Films and Discussion (P)	Trainers' Guide (P)	Evaluation III - (P/W) Data Collection/ Analysis Congruence Diagrams (P) Congruence Diagrams (W)	Seminar Evaluation (P) Questionnaire Closing Ceremonies; Presentation of Diplomas (P) Graduation Reception and Dinner

APPENDIX C: PARTICIPANTS' EVALUATION RESPONSES

APPENDIX C
PARTICIPANTS' EVALUATION RESPONSES

Answers of the 28 responding participants:

Question 1: The readings (articles/books) were:

0	very difficult
2	quite difficult
17	not too difficult
9	not difficult at all

Question 2: The writer handouts were:

1	too many
6	quite a lot
14	not too many
7	not many at all

Question 3: The workshop cases were:

0	very difficult
3	quite difficult
18	not too difficult
7	not difficult at all

Question 4: The pace/speed of instruction was:

2	too fast
13	quite fast
8	not too fast
5	not fast at all

Question 5: The staff as trainers were:

17	very good
11	quite good
0	not so good
0	not good at all

Question 6: The training facilities were:

17	very good
9	quite good
2	not so good
0	not good at all

Question 7: The living accommodations were: (Seminar was not residential)

	very good
	quite good
	not so good
	not good at all

Question 8: The concepts of TTM were:

0	very difficult to understand
2	quite difficult
19	not difficult
7	not difficult at all

Question 9: The TTM technical vocabulary:

1	very difficult to understand
2	quite difficult
18	not too difficult
7	not difficult at all

Question 10: The staff's foreign language accents were:

2	very difficult to follow
4	quite difficult
16	not too difficult
6	not difficult at all

Question 11: The total amount of work required was:

1	too much work
7	quite a lot
20	not too much
0	not much at all

Question 12: The number of TTM topics covered was:

- 0 too many topics
- 16 quite a lot
- 12 not too many
- 0 not many at all

Question 13: The training technique of practical workshops was:

- 16 very good
- 12 quite good
- 0 not very good
- 0 not good at all

Question 14: The use of PMS tools for analysis of key management problems/back-home projects was:

- 20 very helpful
- 7 quite helpful
- 1 not too helpful
- 0 not helpful at all

Question 15: The final week's review of TTM topics helped me understand:

- 17 all topics better
- 10 some topics better
- 1 not many topics
- 0 none at all

Question 16: As a reinforcement of learning, the practice teaching sessions were:

- 12 very helpful
- 14 quite helpful
- 2 not too helpful
- 0 not helpful at all

Questions 17, 18, 19, and 20

<u>Topics</u>	<u>Most Interesting</u>	<u>Least Interesting</u>	<u>Most Useful</u>	<u>Least Useful</u>
Creative Problem Solving	16	0	18	0
Logical Framework	21	0	24	0
Performance Networking	12	2	13	1
Evaluation/Monitoring	7	2	10	0
Communication	6	1	8	2
Back-Home Project	11	1	14	0
Practical Training	7	4	6	4
Management Theory	13	1	8	1
Human Factors	14	0	10	0

APPENDIX D: DISTRIBUTION OF HOURS BY TOPIC AREA

APPENDIX D

HOURS SPENT BY TOPIC AREA

	<u>HOURS</u>	<u>PERCENT</u>
1. Systems Approach to Management: PMS	5	3%
2. PMS: Design	40	27%
3. PMS: Implementation	20	13%
4. PMS: Management Information (Monitoring and Evaluation)	15	10%
5. Training Concepts and Video Presentations	20	13%
6. Organization Problem Diagnosis	25	17%
7. Organization, Management and Leadership (including Matrix Management Techniques)	25	17%
	<hr/>	<hr/>
SUBTOTAL	150	100%
8. Seminar Logistics	10	
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TOTAL	160	

In addition, an estimated average of 40 additional hours per participant was spent in homework and reading assignments. Eight evening workshops of 2 hours duration were also conducted on selected topics, with average attendance of about 16 participants.