Promoting Educational Organisation Through People

HR Management

Lisbon Training Sessions
27-31 October 2014

SHORT BIOGRAPHY

TALK DESCRIPTION

TRAINER: Aldina Carvalho (aldina.carvalho@tecnico.ulisboa.pt)
COURSE: HR Manual: Processes and Procedures

SHORT BIOGRAPHY

Aldina Carvalho is Master in Business Administration and Public Policy, ISCTE-IUL. Technical collaborator in the Quality and Internal Audit office at the Instituto Superior Técnico (IST).

TRAINER: Cecilia Moreira (ceciliam@tecnico.ulisboa.pt)
COURSE: HR Manual: Processes and Procedures

SHORT BIOGRAPHY

Leader of the Quality and Internal Audit office since is implementation in IST in 2004, produced audit reports and recommending improvements in processes and procedures. Effectively communicate with management providing technical guidance to operational issues. Played a crucial role on various evaluation projects. Member of the Board of Management for Quality. Strong critical thinking skills, patience, multi-tasking, good diplomatic skills. Member of the Portuguese Institute of Internal Audit.

TRAINER: Isabel Gonçalves (isabel.goncalves@tecnico.ulisboa.pt)
COURSES: Develop and Motivate others; Negotiation and Persuasion; People Management and Leadership

SHORT BIOGRAPHY

Isabel Gonçalves is the Coordinator of Tutoring Office at IST. Her background is in Cognitive Beahavioral Psychology, and she's also a trained coach. Tutoring office is responsible for the training of both Teachers and Students in soft skills, specially using the Emotional Intelligence framework. Isabel Gonçalves is at the present the leader of the Higher Education Counselling Services Association and also is a trainer at the Cognitive Behavioral Training Association.

TRAINER: Luis Cruz (luis.cruz@tecnico.pt)

COURSE: Information Systems and Technologies

SHORT BIOGRAPHY

Luis Cruz is an open source enthusiast, with contributions mainly focussing on academic information systems for higher education. He likes to indulge in software architecture, design patterns and application performance profiling and analysis. He is currently a principal contributor to the FenixEdu project and is the coordinator of the Area of Applications and Information Systems at Instituto Superior Técnico. He has a degree in Information Systems and Computer Engineering from Instituto Superior Técnico.

TRAINER: Miguel Coimbra (miguel.m.coimbra@tecnico.ulisboa.pt)

COURSES: Performance Evaluation; Recruitment Processes

SHORT BIOGRAPHY

Miguel Coimbra is the director of the Human Resources Division at Instituto Superior Técnico. He works closely with the executive board in HR management tasks. Miguel works in the field of Human Resources in the Public Administration since 2002, with management responsibilities since 2005, always at universities. Previously, he worked in planning. Miguel holds a degree in Sociology, and has attended several training courses in human resources and related matters.

TRAINER: Nuno Rolo (nuno.rolo@ist.utl.pt)

COURSE: Management by Objectives

SHORT BIOGRAPHY

My expertises are public governance and public policy reforms on public administration, leadership and people management, human resources management, performance evaluation systems, and European public policies. I have professional experience as a lawyer, teacher, ministry and OECD consultant, legal adviser, public and ONG manager, speaker and trainer, especially in the public sector, ONG, and other civic associations alike.

Degrees: PhD candidate in Public Policy (HRM), DEA in Public Policy, Master in Public Administration and Public Policy, DEA in Public Management, a mini MBA in HRM, DEE in Leadership and People Management, Post-graduate in Legal-Political Sciences, and in Contemporary Political Doctrines, and graduate in law.

TRAINER: Rui Mendes (rui.mendes@tecnico.ulisboa.pt)
COURSE: Satisfaction Surveys

SHORT BIOGRAPHY

He has a degree in Sociology, branch of Labour; he took his MSc degree in Statistics and Management of Information. Currently, he coordinates IST Studies and Projects Unit and is also responsible for IST's Graduate Employability Observatory. He is a permanent member of the General Council of the University of Lisbon and a representative of the same institution at the Working Group of CRUP (Council of Deans of the Portuguese Universities) regarding the Professional Integration of Graduates in Portugal. He is an observer member of the Faculty Council of Instituto Superior Técnico; he is an experienced trainer in Statistics, Good methodologies in survey construction, Online surveys, Information systems, Data analysis in SPSS.

TRAINER: Sofia Sá (sofiasap@tecnico.ulisboa.pt)
COURSE: Team Work and Cooperation; Communication

SHORT BIOGRAPHY

Sofia Sá is a Educational Psychologist, passionate by Training specially the one that envolves Comunication and Teacher Training. Master in Educational Psychology (ISPA), Certified Trainer with the Portuguese Certificate of Pedagogical Competence (CCP), Qualified and registered with the Scientific and Pedagogic Portuguese Council for Continual Training (CCPFC). Since 2002, is a trainer and consultant in several Companies and Public Institutions. Now collaborates with GATu (Tutoring Support Office) of IST with a professional scholarship.

COURSE: **HR Manual: Processes and Procedures**

Trainers: Cecilia Moreira/Aldina Carvalho

TALK DESCRIPTION

Internal Control System as the guarantee that the policies/regulations and procedures are observed within the Organization. Internal Audit as a way to provide quality to ensure the adequacy and effectiveness of the system of internal controls and the quality of performance on various operations. Internal audit is the main tool that the Management/Govering Bodies have in order to assess the System effectiveness.

WHAT IS INTERNAL CONTROL AND WHY IS SO IMPORTANT

Internal control is a process within an organization designed to provide reasonable assurance of the following objectives:

- That information is reliable, accurate, and timely.
- Of compliance with policies, plans, procedures, laws, regulations, and contracts.
- That assets (including people) are safeguarded.
- Of the most effective, economical and efficient use of resources.
- That overall established objectives and goals are met.

Internal Controls includes approvals (formal permission), authorizations (power granted), verifications (confirmation of accuracy) , reconciliations (internal records consistent with University records), reviews of Operating Performance, security of Assets and segregation of Duties (custody of assets, authorization/approval, recording/reporting).

Internal control is so important because intended to prevent errors or irregularities, identify problems, and ensure that corrective action is taken.

CONTROL ACTIVITIES

As control activities we have:

- Documentation (The whole **Management System** must be designed according to a structure of documents, as follows:
    - Legislation
    - Strategic Documents
    - Quality Manual
    - Manuals and Regulations
    - Forms
    - Other Documents
- Segregation of duties
- Performance indicators
- Physical controls
- Information processing

INTERNAL CONTROL ADVANTAGES

- To check the thruthfulness of information and of accounting, financial and operating reports;
- To prevent fraud and, where it occurs, to determine its extension;
- To locate sources of error and waste, by promoting uniformity and correction in recording operations;
- To encourage personnel efficiency through monitoring;
- To provide the administration with accurate, concise and objective information, which reflects reality;
- To safeguard assets and obtain an efficient control regarding vital aspects of the activity;
- To achieve maximum results with minimum human, material and financial resources;
- To allow for detection of errors and fraud.

INTERNAL AUDIT ROLE IN INTERNAL CONTROL

- Internal Audit is the main tool that the Management has in order to assess the system effectiveness.
- The purpose of Internal Audit Office is to provide quality auditing services to ensure the adequacy and effectiveness of the institution system of internal controls and the quality of performance by various operations.

PROCEDURES MANUAL AND HIS ADVANTAGES

A Procedure Manual consists of a document, which contains a duly organized number of norms, procedures, functions, activities, objectives and guidelines that must be observed. This document also describes the way they are carried out, either individually or jointly with others.
Advantages:

- Is a source of information regarding services
- Coordinates effectively activities
- Is a reference/guidance tool for the services
- Attains the excellence objectives in management
- Assures rigueur and completeness of records
- Establishes relationships of trust
- Prevents and detects lack of compliance and errors
- The Procedures Manual clarifies processes, preventing inadequate improvisation, imposes coherence and continuity – norms and procedures by different services and helps integrate new employees (handover).
- Document the Process!
- Pick a method that suits the process: flowchart or narrative;
- Identify policies that impact the process; identify standards that may specify mandatory controls;
- Identify process owner and activity owners;
- Identify the key inputs, activities, outputs, risk points.

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http://www.ipai.pt/fotos/gca/coso_guidance_on_monitoring_intro_online1_0021_1271014488.pdf
http://aqai.tecnico.ulisboa.pt/

COURSE: Performance Evaluation

Trainer: Miguel Coimbra

TALK DESCRIPTION

We will briefly discuss the importance and role of the performance evaluation in the HR management system, suggesting an integrated approach to this matter, where the evaluation is based in organizational and individual objectives. We will present some rules to establish performance objectives and measurement indicators and, as an example, have an short overview of the performance evaluation system at IST.

1. WHAT IS PERFORMANCE EVALUATION

Determination of the outcome of an employee's actions, within his/her position, in order to assess that employee's contribution for the organization.

The performance evaluation (PE) is a part of the Human Resources Management system and must be a formal process, with pre-determined procedures, instruments and time frame.

The goal of PE is to assess performances, not the employee's as persons.

2. WHY EVALUATE

Only through the evaluation of the performance it's possible to improve it.

PE allows managers and staff to discuss performance and identify, together, strengths and weakness, training needs and career prospects

Thus, PE is a way to improve communication, to develop career management and to line up efforts in the organization.

The reward/penalty system must be linked to PE.

3. PERFORMANCE EVALUATION BY OBJECTIVES

In PE by objectives the evaluation is based in the comparison between the desired results for the employee's performance and the results actually achieved.

To express and compare results is used a set of measurement indicators, which allow us to establish a degree of accomplishment for each objective.

4. AN INTEGRATED APPROACH

In an integrated management system, the evaluation of the managers and employee's performances is based on the objectives set for the organization, at its several levels: strategic objectives provide the objectives for the evaluation of top managers; management objectives provide the objectives for the evaluation of middle managers; and operational objectives provide the objectives for the evaluation of staff.

These sets of objectives must be coherent and interdependent: the objectives for each level are a specification of the objectives for the level above.

Therefore, the disaggregation of the strategic objectives provides objectives for units/departments and for the middle managers in charge here; the disaggregation of the later provides objectives for the staff of the unit/department.

5. SETTING UP PERFORMANCE OBJECTIVES

Performance objectives must be:

Concrete – objectives are not mere intentions; they must define concrete results to be achieved.

Measurable – objectives must allow the use of indicators and metrics to measure performance.

Ambitious but achievable – objectives must provide an improvement to present situation, but that improvement must be realistic, attainable and sustainable.

Relevant – objectives must make a difference to the organization.

Resource aware – objectives must be attainable with the resources (financial and others) available or planned.

Power/authority aware – objectives for an employee must be achievable inside the power scope of that employee.

Time-framed – objectives must be delimited in time and must have a deadline.
Evaluating by objectives increases accuracy of the evaluation process and helps to clarify responsibilities and accountability.
PE by objectives is a motivation tool, because it gives purpose to performances, eases communication and puts the focus on achievements rather than tasks.

6. SETTING UP PERFORMANCE MEASURES

The level of achievement of a performance objective is determined by one or several indicators, which allow us to measure the achieved results and, thus, to establish a degree for or quantify the performance.
Indicators are measurable variables that provide information about the desired result.
For each indicator there must be a target. Targets are the values/degrees of those variables that show the desired result was attained.
Each indicator must have a specification that includes the formula of calculation and the source of information and data.

7. EVALUATION PROCESS

Stage 1 (before the period under assessment):
Global objectives for the organization are acknowledged an unfolded in department objectives.
Managers set guidelines to put in motion the evaluation process and define procedure details.
Stage 2 (period under assessment)
Right in the beginning, evaluators define performance objectives and measures for each employee they evaluate, according to the organizational and departmental objectives.
The performance objectives must be negotiated with the employee and there must be a face-to-face discussion about them.
During the period under assessment, the development of the objectives must be monitored at all times, including the analysis of provisional data from the measurement indicators.
Stage 3 (after period under assessment)
Self-assessment.
Evaluation, with the attribution of quantitative and qualitative scores.
Analysis of the performance, identification of training needs and career development.
There must be a face-to-face meeting (in which objectives for the following period may be discussed).

A FEW USEFUL LINKS

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https://hbr.org/2011/11/delivering-an-effective-perfor/
KNIGHT, Rebecca, “Delivering an Effective Performance Review”, Harvard Business Review, 2011 Nov
http://www.dgaep.gov.pt/eng/index.cfm?OBJID=27887f50-0e72-45a7-a421-a805d34371f3
Insights on the Portuguese Public Administration (and IST's) Performance Assessment System, with a link to the English version of the applicable law.
http://www.hr.duke.edu/managers/performance/University/performance/index.php
Performance evaluation system at Duke University (USA).
http://drexel.edu/hr/career/review/
Performance evaluation system at Drexel University (USA). Includes some useful tips, with an emphasis on performance objectives.
http://search.dilbert.com/comic/Performance%20Evaluation
Comics about what to (not) do in performance evaluation.

COURSE: Recruitment Processes

Trainer: Miguel Coimbra

TALK DESCRIPTION

We will try to understand the importance of recruitment in the scope of an organization and discuss some principles, tools and technics to a better development of this activity.

1. FROM RECRUITMENT TO PLACEMENT

The goal of recruitment processes is to find a new employee, either to replace someone that has left the organization or to fill a new vacancy.

We can identify three major stages:

Recruitment – search for applicants and provide them with information, to ensure we have the best candidates.

Selection – gather information about the candidates and differentiate, to identify the most suitable.

Placement – assign the selected candidate to the job and receive him/her in the organization.

2. ROAD MAP

STEP 1: identify needs for recruitment

STEP 2: define requirements, answering the question: "what does it take to do the job?"

STEP 3: find applicants that meet the requirements

STEP 4: evaluate the applicants to check if, and in what extent, they meet the requirements

STEP 5: choose a candidate

STEP 6: hire the selected candidate

STEP 7: receive and place the new employee

3. RECRUITMENT NEEDS

Planned, such as retirements, other predictable exits and those determined by organizational changes.

Unexpected, such as resignations, accidents, deaths, illness.

4. REQUIREMENTS AND COMPETENCES

Define what features the candidates must hold to perform well on the job: academic and technical knowledge, qualifications, skills and behaviours. These features are 'competences'.

We can make a distinction between two types of competences: technical and behavioural.

Technical competences (hard skills) are related to academic and technical knowledge, acquired at school and in other formal training processes. They are cross-cut to organizations – don't change from one to another – and appeal to intelligence. Can be defined as "know what to do".

Behavioural competences (soft skills) are personal skills, acquired by experience and practical training. They are sensitive to the organization – may change from one to another – and appeal to emotions and informal knowledge. "Know how to be or how to perform".

For each vacant job we must define a competence profile, which is the set of technical and behavioural competences required to that job. This profile will help us to determine how we will try to find candidates and how we will choose the best.

5. FINDING CANDIDATES

First, we must choose if we are going to search candidates inside the organization (internal recruitment) or outside (external recruitment).

Internal recruitment is quicker and less expensive. It also involves less risk, because we already have much information about the candidates, and the integration process is easier. It works as a motivation tool that gives career prospective to the employees. On the other hand, it restrains innovation in the organization and has a more narrow set of candidates.

External recruitment includes a broader choice of candidates and brings new ideas and experience to the organization. But it is more expensive and longer, with a harder integration and more chances of failure.
We can search for candidates in our country or abroad, or restrain our search to educational institutions, such as universities, depending on the characteristics of the job and the competence profile.

6. SELECTING CANDIDATES

The selection process, in most cases, includes three stages: CV screening, selection tests and job interview. The methods in each one of this stages are applied in sequence, with the elimination of the candidates that don´t meet the criteria. Therefore, the number of candidates decreases after each stage.
In CV screening we evaluate curricula and other documents presented by the candidates to check of they meet formal and basic requirements, to eliminate those clearly unqualified.
Selection tests are applied to check if the candidates hold the required competences. We use standard instruments and measures to evaluate knowledge, intelligence or personality.
The job interview is a formal meeting, with face to face interaction with the candidates, where we discuss the candidates' abilities, experience and expectations and clarify details. The job interview may include several types of questions, and spans from a non-directive to a fully structured conversation.
With the information provided by the selection methods, we are able to make a final decision and choose the most suitable candidate. We must select the one that meets the competence profile and that is more likely to share the organizations values and denotes more motivation.

7. HIRING AND PLACING

We must set a meeting with the selected candidate, to discuss the contract, salary and benefits, work schedule and other operative questions. And, of course, to define the starting date.
Before the starting day, we must prepare the work site.
There must be a particular attention in the welcome process. If the welcome manual exists, it must be handed to the new employee.
We must provide information about: duties and responsibilities, regulations and policies, the organizational structure, key managers, safety rules, facilities (cafeteria, bathroom, parking).
And, of course, present him/her to co-workers, managers and other relevant people.

A FEW USEFUL LINKS

http://www.ipfw.edu/dotAsset/17a79aed-cd30-4213-8d9b-7dc243af42b8.pdf
http://www.ipfw.edu/dotAsset/226773.pdf
Manuals for recruitment and selection at University of Indiana–Purdue University Fort Wayne (USA)
http://www.ucl.ac.uk/hr/docs/recruitment.php
Recruitment and selection policy at University College London (UK).
http://hr.uoregon.edu/recruit/recruitment-and-selection/guidelines-recruitment-and-selection
Guidelines for recruitment and selection at the University of Oregon (USA).
http://search.dilbert.com/comic/recruitment
Comics about what to (not) do in recruitment processes.

COURSE: Information Systems and Technologies

Trainer: Luís Cruz

TALK DESCRIPTION

This talk will give an overview of the role information systems play an organization, and how they use information systems to improve communication and maintenance of information. Examples of how some processes were improved at Instituto Superior Técnico with information systems will be demonstrated. The talk will uncover important characteristics information systems must have if they are to be useful to organizations.

In any organization, communication is essential and it goes hand in hand with access to information. The bigger the organization, the greater the need for good communication. Information systems can help, by making information available 24/7 and by improving communication by allowing access to information from any place on the planet. In the best case information systems can free up resources for other tasks.
Some local tools are good for small organizations, for example excel and word documents, but as the size of an organization grows, modified local copies of the same document have inherent synchronization problems and may result in communication problems. Larger organizations require a different set of tools.
Processes help organizations structure their communication. Different departments may have different ways of doing the same thing. Centralizing common processes may bring an economy of scale but at a price, that price is simplicity. after all: “small is beautiful”. Generalizing processes to work at larger scale is challenging. Not every stakeholder will be happy, but the big picture is a better working organization.
Most processes start off in an analog format. Only after patterns emerge and a certain scale is achieved should they be made digital. Not every process should be modeled by a digital workflow. Over engineering a process too early may lead to a hindered flexibility. The possibility of change must be incorporated into any process. Also any process has to be aware of exceptions.

Workflow systems are one possible solution put forth by information systems to help digitize analog processes. There are many types of workflow systems available, but they all have some aspects in common: the capture and flow of information between people coupled with state changes that describe the status of a given process. At IST we have many examples of processes that are modeled by our information systems. These range from academic to administrative processes. Some are dictated by national legislation, others are workflows standardized by internal regulation and others are a mix of internal standards with custom behavior depending on the department in which they occur.

In order to have accountability you must first have transparency.

- Who authorized a process?
- When was a certain operation executed?
- Who changed a certain value?
- What information was available on a certain date?

Any information system should be able to respond to every question stated before, if it is to have accountability. Also each user must have his/her own login credentials. If different users share login credentials, then there is no accountability.

The user that makes a certain decision must have access to all information necessary for that decision. All users with access to a process must know the state of the process, how it got to that point and how it will proceed. Making all information available to all leads to better quality of data. A user should have access to all the data that pertains to his/her person. Information should be input by the person who decides/determines that information, not by their secretary or by some administrative service.

COURSE: Team Work and Cooperation & Comunication

Trainer: Sofia Sá

TALK DESCRIPTION

"*If you want to go fast, go alone. If you want to go far, go together*". African proverb

This talk will make a general approach of what means to be a Team, the principal obstacles to Teamwork and suggestions for solutions. With more detail, we will see the main competencies of a true Team Leader and techniques to develop your main areas to improve.

What defines a Team? According Thirumalaisamy, Selvakumar and Mohanraj (2014), "A team consists of a group of individuals linked by a common goal" (p. 100).
Another feature pointed to the teams is the synergy, where the whole is more than the sum of its parts - "the members of a team are complementary and together can do much more than each individual alone. A well-designed Team is more than the members that constitute it "(Muller, 2011, p. 1). However, several experts join together is insufficient to ensure effective performance of the team, even if its members share a common purpose (Stagl et al., Cited by Espevik & Olsen, 2013). In fact, newly formed teams show little effective collaboration strategies and hence a poorer performance than those established earlier (Espevik & Olsen, 2013), because its members are still developing effective communication strategies and gain confidence and trust in each other (Fung, 2014).

The advantages of working in team for a simple group work are many and of various kinds, the clearest being the fact that Team, the work is much more challenging and rewarding, and the possibility of "individuals who participate Team discussions have ideas that would no longer part if they had undertaken the task alone "(Fern, Cardinal, & O'Neill, 2012, p. 434).

As suggested in different literature, one of the main objectives of each individual should be to find his task in teams, between previously standardized categories related mainly with their personality traits. Merchant (2014), for example, suggests nine kinds of paper / personality that must exist in effective teams from the Dynamic / Outgoing whose task is to give ideas and launch challenges, the Implementer /talker that actually does the work.

This type of conceptualization is two dangers, which jeopardize the development of skills necessary for true team work. The first is referred to by Hastie, Fahy and Parratt (2014) argue that "this type of model assumes that the way people behave is currently Team defines as will behave in future teams which, as educators, we reject" (p .222).According to the same authors, all skills related to team work can be trained in training. If we take as personality traits, the areas for improvement are seen as final which is far from reality.
It is undeniable that some people feel better in certain roles but this is the second danger of this type of conceptualization. If the person stabilizes the role that is comfortable for you, challenges the flexibility of their role in the team. If, for example, a team member decides to assign the role of Dynamic / Extrovert is likely to rely on it for just that, because it is congruent paper with your personality. Is what was categorized Implementer /talker will be receiving enjoy challenges as does the rest of the work yourself? Or is expected that, initially, all launch ideas and, in a last, everyone participates in carrying out the work?

The categorization of the team in types of workers can undoubtedly be very helpful to recognize which aspects they most identify. Then sign. But the sign that less identified. These are your areas for improvement and that, once exceeded, will make him a true Team Player.
What then waiting a Team Player? There are numerous features that mostly boil down to one - be a good communicator, in various situations, contexts and tasks.

Pentland (2012) summarizes this issue "concluded that the communication patterns are the best antevisor the success of a team. Also, are as significant as all other factors - individual intelligence, personality, skills and content of the discussions - together. "
Was Thirumalaisamy, Selvakumar, and Mohanraj (2014) who rated the skills necessary to a true Team Player: Toward **Planning and Project Management**, the authors refer to the help coordinate the team, going to meetings, set goals, allocation of roles, among others. Generally attributed to more organized and less outgoing members, are major tasks importance in the development of any project.
Concerning the **Promotion Team on Climate** authors focus on the importance of optimism about the team and the project, speak positively of and with the other team members, and, among others, adequately participate in informal / social conversations ("small talk "). These authors refer to it but was Pentland (2012) who proved that "social time reveals deeply critical to the performance of the team, being responsible, often by more than 50% of the positive changes in communication patterns". In this study the researcher suggested a company that promotes a set interval to promote this type of contact. Overcome the initial resistance and analyzed the results, the company's director instituted this dynamic as a rule in all delegations and provides raise 15 million dollars with their increased productivity. In the same research it was clear another key aspect - the most effective communication is the face, face to face. Far below are the calls and, on the lower level of effectiveness, written communication, such as email and sms.

The **Facilitation of contributions** of all the other elements includes listening attentively without interrupting others while talking, communicate actively and constructively, to accept the contributions of all and repair when there is someone who is contributing less, enveloping him in the debate. Also Pentland (2012) states that the members of effective teams talk so much as hear, avoid monopolize the shares and maintain their contributions "short and sweet" (short and sweet / nice).

The **Conflict Management assertively** involves avoiding conflicts and minimize minors, manage conflict situations taking into account the needs of all members of the team (including his) neither passive nor aggressive. It also involves dealing with open conflicts in order to maintain the cohesion of the team.
You may have thought that, until now, more as been said about communication and less on how team members actually carry out their work. In fact, in all of the properties listed by the authors, this is the least is concerned. The **Contribution to Team Project** addresses this aspect and includes accepting a fair share of the overall work, develop their tasks competently, effectively use the technology, complete the tasks in the indicated time and give constructive feedback to other team members .

Apart from these features indicated by Hastie, Fahy and Parratt (2014), other authors refer others, such as **adaptability** (Kay, Maisonneuve, Yacef, & Reimann, 2006) to new situations, contexts and tasks; **respect for ownership** of ideas / work of others (Frey, 2013) and the **search for ideas** outside the team (Pentland, 2012), without this minimizes the involvement with the other members.

Once the Team as found her team members and defined its goal, its time to gain Trust. Trust is, indeed, one of the main characteristics of a productive Team. Most of the times, it also represents the main obstacle to a true and collaborative team work. In fact Han-Ping Fung (2014) found that trust in other team members not only encourage project team members to collaborate, as increases interaction patterns, problem solving and, sub consequently, productivity.
So how can we foster Trust in your teams in order for then to perform better and with higher productivity? Trough communication techniques like compliments and feedback. With these two instruments we can transmit not only trust but also high expectations.

Good feedback has fundamental characteristics:

- Frequent
- Timely
- Focused on improvement
- Specific
- Private, if negative
- Honest

The sandwich technique is commonly suggested as the way to give negative feedback, but there are aspects to be considered. Sandwich technique suggest that we should start by saying something positive about the situation, then get to the point or area we want to improve and finish with something positive, of future improvement. This does work in many cases but be aware that many authors suggest that this contradicts the honest premise - “never, ever, ever feed someone a “sandwich.” Don’t bookend your critique with compliments” (Sarah Green, 2014).

Instead, make an effort to be very specific when giving feedback to your teams. “It’s a great proposal” doesn’t help the person to know what in fact was good about it. Enumerate every little thing you love about it “great idea to use the company slogan words in the cover” “excellent relation between the past and the future of your goals”. This way you will help your team to improve and to accomplish their tasks in a more confident way. Remember, compliments must be PSH – Personal, Specific and Honest.

FOR FURTHER READING…

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Understanding when to give feedback. Harvard Business Review: https://hbr.org/2014/12/understanding-when-to-give-feedback

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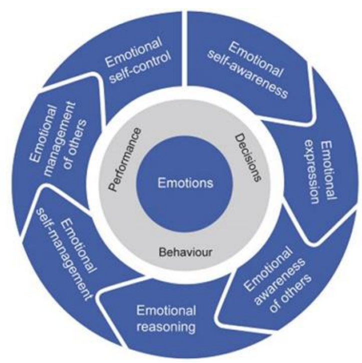
COURSE: Develop and Motivate Others

Trainer: Isabel Gonçalves

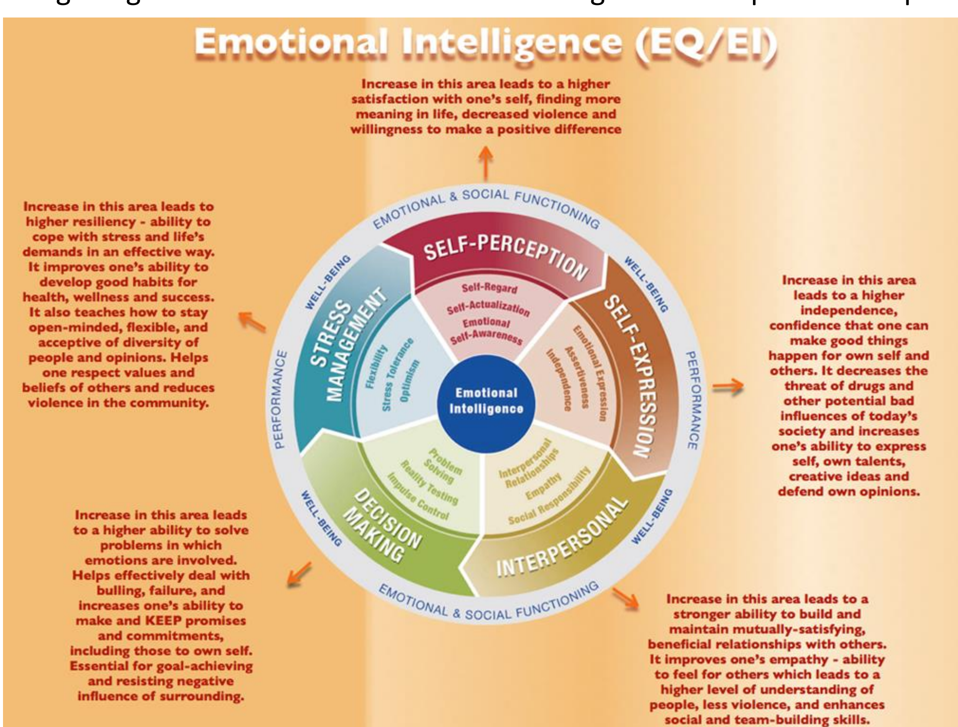
TALK DESCRIPTION

The knowledge area of **Emotional Intelligence** will serve as a basis for the training of participants, allowing them both to identify the needs for development of team members and to design training opportunities for their professional and personal development.
The concept of **Feedback** will be presented and used both to help participants to recognize individual and collective merit and to correct deviations from adequate behavior and at the same time promoting a positive and self-confident environment.

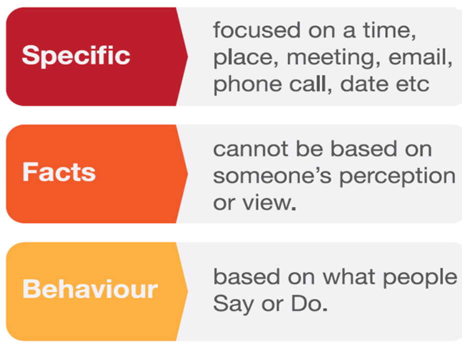
The knowledge area of **Emotional Intelligence** was presented, and an identification of the needs for development of team members was proposed, based on the knowledge that change is not optional. Training opportunities for professional and personal development were identified.



The following image summarizes the Emotional Intelligence concept that was presented:



The concept of **Feedback** was presented and used both to help participants to recognize individual and collective merit and to correct deviations from adequate behavior and at the same time promoting a positive and self-confident environment. Characteristics of appropriate feedback were presented, taking into consideration the importance of nonverbal behavior



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Who moved my cheese - http://www.contraboli.ro/stuff/docs/whomovedmycheese.pdf
Gung Ho!: About the book: http://www.barnesandnoble.com/w/gung-ho-kenneth-h-blanchard/1100181550?ean=9780688154288; a working guide for the organization: http://www.kenblanchard.com/getattachment/Solutions/By-Offering/Engagement-and-Cultural-Change/Culture-Change-%28Gung-Ho!%29/Gung-Ho-FG-Look-Inside.pdf

On Emotional Intelligence:
A Test for Emotional Intelligence (with scoring key):
http://www2.warwick.ac.uk/services/ldc/courses/sdl/the_practical_eq_emotional_intelligence_test_-_2-10-12.pdf
http://www.healthyworkplaces.info/wp-content/uploads/2012/10/emotional-intelligence.pdf
http://khg.edu.vn/upload/file/eBook_Emotional%20Intelligence%20Coaching_Stephen%20Neale.pdf
On Social Intelligence: http://www4.gsb.columbia.edu/filemgr?file_id=481662
Developing Emotional and Social Intelligence:
file:///C:/Users/isabel.goncalves/Downloads/Handbook_for_Developing_Emotional_and_Social_Intelligence_2009.pdf
On Empathy and Feedback: http://internationaljournalofcaringsciences.org/docs/Vol1_Issue3_03_Ioannidou.pdf
http://www.ccl.org/Leadership/pdf/research/EmpathyInTheWorkplace.pdf
https://dschool.stanford.edu/wp-content/themes/dschool/method-cards/empathy-map.pdf
Videos on empathy:
https://www.youtube.com/watch?v=1Evwgu369Jw
http://www.ted.com/talks/vs_ramachandran_the_neurons_that_shaped_civilization

COURSE: Negotiation and Persuasion

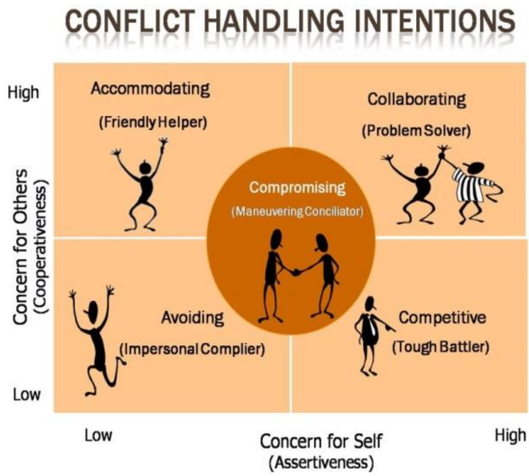
TRAINER: Isabel Gonçalves

TALK DESCRIPTION

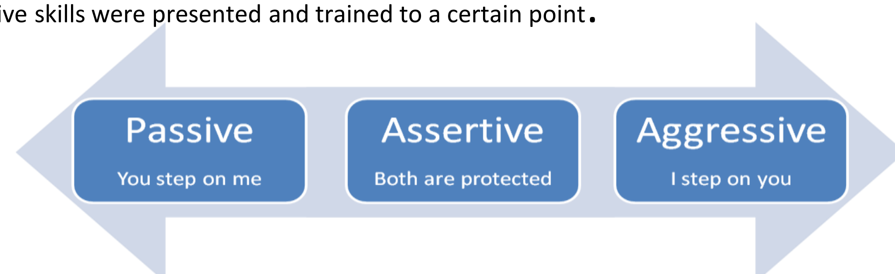
Questioning and **Active Listening** will be the basis for the training of participants in a **Leader-Coach** approach that facilitates the management of conflicts of interests and increases participant's ability to reach consensus with people and groups. Win-win solutions will be sought as a means to reach an agreement and also as a way to build a positive environment within the team and when negotiating with third parties.
This approach will also facilitate tolerance to pressure and adversity, increasing resilience within a positive frame of mind.

Questioning and **Active Listening** are the basis for the training of participants in a **Leader-Coach** approach that facilitates the management of conflicts of interests and increases participant's ability to reach consensus with people and groups.

Win-win solutions are to be sought as a means **to reach an agreement and also as a way to build** a positive environment within the team and when negotiating with third parties.



This approach will also facilitate tolerance to pressure and adversity, increasing resilience within a positive frame of mind. Assertive skills were presented and trained to a certain point.



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http://www.imd.inder.cu/adjuntos/article/388/Coaching%20Skills%20for%20Leaders%20in%20the%20Workplace.pdf
Questioning and Listening: http://inside.augsburg.edu/publicachievement/files/2012/12/cs_artofquestioning.pdf

Conflict Management
http://www.edcc.edu/counseling/documents/conflict.pdf
Six essential skills for managing conflict: http://www.imd.org/research/publications/upload/PFM149_LR_Kohlrieser.pdf
Conflict resolution skills: http://www.edcc.edu/counseling/documents/conflict.pdf

Workplace Resiliency
http://www.psychologyfoundation.org/pdf/publications/WorkplaceResiliency.pdf

Assertiveness & Non Violent Communication
http://www.spsu.edu/counselingservices/personal/documents/Assertiveness%20techniques.pdf
http://www.gesp.ipg.pt/files/assertiveness.pdf
http://www.ayahuasca-wasi.com/english/articles/NVC.pdf
http://www.nonviolentcommunication.com/pdf_files/key_facts_nvc.pdf

COURSE: People Management and Leadership

TRAINER: Isabel Gonçalves

TALK DESCRIPTION

Participants will learn how to manage and influence positively the team, mobilizing it to the objectives of the Unit/Organization, encouraging initiative and accountability.
Participants will also be invited to use what they've learned in order to build a change program for their team in the following year, using the principles of the **Coaching** and of the Emotional Intelligence frameworks.

This last module applies what the previously presented modules explained, building a framework on how to manage and influence positively the team, mobilizing it to the objectives of the Unit/Organization, encouraging initiative and accountability. A small summary of leadership skills was presented.

And an application of the emotional intelligence concept to teamwork was briefly presented.

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Leaders - born or made? http://mitleadership.mit.edu/pdf/LeadershipinanAgeofUncertainty-researchbrief.pdf
https://www.haygroup.com/downloads/fi/leadership_that_gets_results.pdf
http://promeng.eu/downloads/training-materials/ebooks/soft-skills/leadership-skills.pdf
http://www.harvardbusiness.org/sites/default/files/HBR_Strategic_Leadership.pdf
http://www.changeforchildren.co.uk/uploads/primal-leadership.pdf

Teambuilding
Building the Emotional Intelligence of Groups (2001) – PDF
http://www.abahe.co.uk/business-administration/Leadership-and-Team-Building.pdf
http://www.free-management-ebooks.com/dldebk-pdf/fme-team-building.pdf
http://www.kolegjifama.eu/materialet/Biblioteka%20Elektronike/Handbook_of_Management_and_Leadership.pdf
http://www.who.int/cancer/modules/Team%20building.pdf
http://www.marshallgoldsmithlibrary.com/docs/articles/Team_Bldg_wo_Time_Wa.pdf
Stages of Teambuilding: http://coalitionswork.com/wp-content/uploads/stages_of_team_building.pdf

Motivation
https://www.itmpi.org/Portals/10/PDF/WarigonPeople.pdf
http://www.jblearning.com/samples/076373473X/3473X_CH02_4759.pdf
http://wweb.uta.edu/management/Alankrita/3319/Readings/One%20more%20time%20how%20do%20you%20motivate%20employees.pdf
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http://oktato.econ.unideb.hu/kunandras/BAINMBA/SlidesHRM/Handbook.of.Human.Resource.Management.Practice_10th.pdf
A video: https://www.youtube.com/watch?v=u6XAPnuFjJC

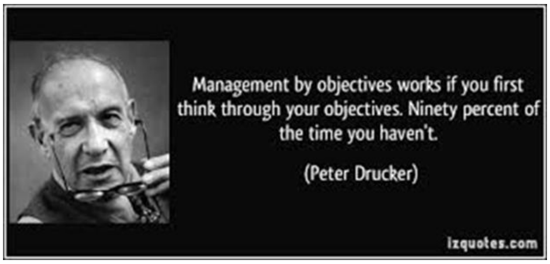
COURSE: Management by objectives

TRAINER: Nuno Cunha Rolo

TALK DESCRIPTION

In this course, we will discuss MBO philosophy, technique and principles, according to Peter Drucker's thought. We will mentioning the MBO in EU public sector standards and practices, and in the Portuguese system as well.

Peter Drucker wrote extensively about Management by objectives (MBO), by which is known as the father of modern management. MBO was popularized in his book “The Practice of Management” (1954). MBO: is a systematic and organized approach that allows management to focus on achievable goals and attain the best possible results from available resources.
MBO aims to increase individual and organizational effectiveness by aligning organizational goals and subordinate objectives , and clarifies and quantifies objectives to allow for monitoring, evaluation, and feedback throughout the hierarchy of objectives.
MBO can be defined as a process whereby the employees and the superiors come together to identify common goals, the employees set their goals to be achieved, the standards to be taken as the criteria for measurement of their performance and contribution and deciding the course of action to be followed.



Peter Drucker also stated that for the business to succeed, the managers and employees must work towards a common goal, managers must identify and agree targets for achievement with subordinates, and managers must negotiate the support needed to achieve the targets with subordinates. After that, evaluating the objectives over time must be a cyclic rule.

There are five main principles using MBO: cascading of organizational goals and objectives (focus on goals not methodologies), specific objectives for each team member, participative decision making, explicit time period and performance evaluation and feedback.

Good MBO practice includes a use of a limited number of clear and understandable targets; providing employee participation to guarantee the commitment of public services staff to the performance management system; reduction in the density and complexity of administrative rules and directives; reliable, flexible, and ‘real-time’ management information system for monitoring progress toward targets; fair and transparent procedures for assessing and rewarding performance; complementary quality management approaches.

Regarding European countries, there are some lessons learned:

- MBO systems will become more widespread in European Public services (and other OECD countries) in the near future than is already the case.
- Results-orientation and enhancement of public accountability will remain cornerstones of public sector modernisation and governance (and are not just a fashion trend) for which performance management systems are an important tool.
- However, the possible benefits of MBO are not automatic, but will depend on good design and implementation features.
- Commitment to MBO at all organizational levels is essential to make it work and to avoid typical pitfalls like moral hazard (leads to when an individual or institution does not take the full consequences and responsibilities of its actions, and therefore has a tendency to act less carefully than it otherwise would, leaving another party to hold some responsibility for the consequences of those actions)
- The reduction and simplification of administration rules is a crucial step in the introduction of MBO, and flexibility in implementation can decline again as a result of new programme regulations if not 'defended' by MBO protagonists
- A real-time and user-friendly management information systems is an essential prerequisite for monitoring public services performance and for 'inter-unit benchmarking', as well as top management commitment, MBO purpose, and good fit workers and managers training.

In Portugal, MBO was introduced in 2004 (central and local public administration), and revised in 2007, consagrating and overall integrated system assessment of public administration (SIADAP).

The performance assessment in Public Administration (SIADAP) applies to the performance of public services, their respective managers and all other staff. It is an integrated approach to management and assessment systems allowing for consistently aligning the performances of services and of those who work in them. The assessment is carried out annually and refers to the performance of two calendar year. This process begins with the contracting of the assessment parameters (Results and Competencies) in January/February.

At Mr. Miguel Coimbra Talk, he will present this topic in more depth and more rigorously, within the Portuguese's performance appraisal system.

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COURSE: Satisfaction and on-line Surveys

TRAINER: Rui Mendes

TALK DESCRIPTION

This training action will focus particularly on an initiative created in 2011 at IST, known as SEI/Survey Support, which aimed at regulating the survey implementation policy at IST. The result was the creation of a regulatory framework, online forms for monitoring the process of survey implementation and validation at IST, a specialized support team, and a manual of best practices to elaborate surveys. Concurrently, an IST Service User Satisfaction Assessment System was created on the basis of an internationally tested satisfaction assessment model (SERVPERF). The objective of this training action is to expose the main aspects of the SERVPERF model applied to IST, review the main methodological errors associated with the elaboration of surveys by questionnaire, and understand how the web applications may be a competitive advantage in applying the model.

1.EVALUATION OF IST SERVICE USER SATISFACTION

SEI (Suporte à elaboração de inquéritos – which stands for Survey Elaboration Support) was created in order to guarantee that the use of surveys by the different structures and entities at IST is made by obeying to a set of rules and to the proper methodologies which guarantee that the used information gathering instruments are adequate and provide valid results.

This structure is available for support and consultancy both at an internal and external level and aside from quality assurance in terms of proper methodologies applied it also has a teaching and formative role as it provides and builds in the academic and non-academic community of the institution key knowledge to avoid methodological error which eventually can lead to incorrect outcomes.

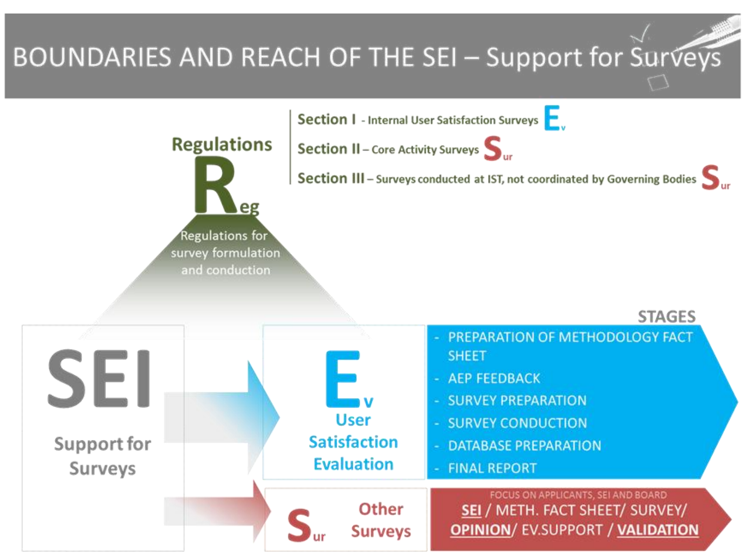
SEI is supported by an internal regulation which has 3 key sections and which define the main courses of action:

Evaluating the satisfaction of the users of the administrative services of IST

Validating and supporting surveys about the IST core activities

Surveys concerning the different kinds of population at IST but implemented by external entities or institutions.

Each one of these 3 sections has a specific set of stages and obligations. This project took off in 2011 and it's currently being consolidated and maturated.



2.THE PHILOSOPHY OF SEI

SEI provides support and consultancy to whom plans to implement a survey. Its area if action ranges from the simple methodological validation of the information gathering instruments already developed up to the support and assistance in building the instrument according to the specific needs of the ones who are going to perform it.

The methodological validation of the internal surveys is mandatory in order to avoid the use of surveys with severe methodological flaws which might bias the obtained results and ultimately work as a flawed support to implemented actions and politics.

Its mandatory facet is assured by an internal regulation created specific to make sure that everyone submits questionnaires and interview scripts to the SEI team in order for them to send out a positive or negative feedback. In terms of process, the submission is made via an online platform in which the proponent states the goals, target population, indicators and expected outcome. According to this information, SEI analyzes the information and submits the approval to the IST management council so that they can validate its eventual application.

Aside from regulating the practice of surveys, SEI also created 2 support documents, simple and objective oriented for both people with and without experience in handling surveys:

- Guide to elaborate questionnaires
- Guide to elaborate interviews

3.WHY THESE MANUALS ARE IMPORTANT TO GUARANTEE THE QUALITY OF THE PROCESS?

This structure aims to support the elaboration of an information collection tool and to ensure methodological rigueur of all surveys conducted at IST. In order to answer to these goals it's crucial to ensure the correct definition of terms, scales, questions and category of answers – "making a survey does not mean making a "good survey".

In the case of questionnaires, it's mandatory to guarantee the production of good instruments, namely:

- How to ask? (Common mistakes to avoid when drafting questions ,e.g., clarity of questions, kinf of vocabulary, using of a pre-test, etc)
- How to abbreviate the "bad examples" (e.g., unbalanced scales, non exhaustive scales, scales with extreme values with different semantics, etc)

4. HOW SEI WORKS?

SEI was launched as a pilot in June 2011 and is a structure, which in the case of external entities surveys and the core activities surveys does not have a formal planning or calendared activity in the majority of its actions. This leads to not having defined goals such as, for instance, to evaluate a minimum of 15 surveys per year. The assurance of quality of the surveys is the main goal

The administrative services survey has a formal planning. The survey is applied yearly (from November to December) and produce results until the end of February of the following year. This survey was initiated in 2011 and at the present time its third application is ongoing. The participation of services is increasing by each application. Also the inquired population and the response rates are increasing. This survey was based on a worldwide tested methodology (SERVPERF model) and focus on the analysis of the perceptions that the users have of how they were treated when using the services. This evaluation is based on 10 main indicators (plus 15 optional) fitted into 5 main dimensions: Tangibility, Empathy, capacity to reply, reliability and guarantee/assurance. At the end of the process each service gets a sheet with the results which also include suggestions gathered from the justification on why some items were evaluated with a negative rating.

In resume, there are several methodological aspects involving in the application of the model and the questionnaires:

- This is an international model tested in public administration and universities — adapted to Técnico (SERVPERF): the performance perception is the leading factor to determine satisfaction;
- We've defined an indicator selection process (10 fixed and to 15 optional) involving the units and their specificities;
- This survey takes place online every civil year between November and December;
- We've applied one 7-point Likert scale (1 — Fully Disagree / 7 – Fully Agree)
- All eligible services are contacted annually to participate in the exercise (Areas, Units or Offices).

5. ACHIEVED RESULTS

Concerning the core activities survey and the ones made by external entities or institutions, being SEI a fairly recent structure and without a formal planning, the achieved results are summarized exclusively to the assurance that the surveys made at IST obey to the methodological rules which provide valid and proper outcomes. For instance, SEI validated the surveys applied in the project which evaluated the conditions of the libraries of the IST campuses. Concerning the administrative services surveys, the participation is clearly increasing (2011 – 16% of the services were evaluated, 2012 – 30%, 2013 –52%). The process is voluntary but both the services and inquired population have been growing.

DIMENSIONS OF ANALYSIS	RESULTS YEAR 2013		
INDICATORS	**Min**	**Max**	**Aver**
RELIABILITY			
Ability to do the job reliably and carefully	5,1	5,8	6,6
Within the deadline specified/agreed	4,7	5,6	6,6
As specified	5,1	5,7	6,4
EMPATHY			
Degree of individual attention and care paid to user	4,7	5,6	6,6
Understanding of user's needs	5,1	5,7	6,5
Suitability of working hours	3,8	5,4	6,5
TANGIBILITY			
Aspect of facilities, buildings, equipment, employees and appearence in general	4,5	5,5	6,2
Website/platform attractiveness/design (*1)	4.7	5.0	5.3
Website/platform navigability (*1)	4,8	5,0	5,4
Good-looking employees (*2)	5,5	5,9	6,1
Visually attractive facilities (*2)	4,9	5,1	5,4
GUARANTEE/SAFETY			
Professionalism and politeness inspiring credibiliy and giving user a sense of safety in relation to the service	5,2	5,9	6,7
Competence/knowledge to clarify doubts	5,2	6,0	6,5
Employees' good treatment/education	5,4	6,3	6,7
CAPACITY FOR RESPONSE			
Commitment to rendering services in a timely manner and within the deadline fixed with willingness, interest and readiness of responding to user's demands	5,1	5,7	6,8
Agility/Speed of service	5	5,7	6,4
Permanent availability of service	5	5,7	6,5

NOTE: Alternative indicators (*1) or (*2) according to the users' prefered means of contact (*2)

While being oriented to support and consultancy, SEI had a key role in the administrative services surveys in the sense that it was responsible for setting up the whole process and for implementing it and publishing the results.

6.PROCESS ASSESSMENT

- Need to mobilize/raise awareness of services and users to participate in the process
- Possible flexibilization of some mandatory indicators
- Shift towards less involvement of services in selecting indicators
- Some services encounter difficulties in providing a list of users (unknown contacts)
- Surveying bases that fail to meet required quality (inclusion of contacts that were not service users)

7.CONCLUSIONS

- All dimensions and mandatory indicators were given a positive average assessment (>4)
- The average value of global satisfaction increased from 5,2 in 2012 to 5,7 2013
- 57% of services surveyed have an average value of global satisfaction between 5,7 and 6,5
- There are improvement and corrective measures implemented by the services after receiving the results of surveys:

IMPROVEMENT/CORRECTIVE ACTIONS

Some examples

MOBILITY AND INTERNATIONAL COOPERATION UNIT

✓ **Problem:** *"…some slowness and burocracy in process"*

✓ **Corrective measure:**

		2013/14 - 1º semestre		2014/15 - 1º semestre	
	Tarefa	*Período em que decorre*	*Responsabilidade*	*Período em que decorre*	*Responsabilidade*
Application	Candidatura	15 Maio a 16 Junho	Aluno	15 Maio a 16 Junho	Aluno
Curriculum approval	Aprovação do currículo	17 a 30 de Junho	Coordenador de Curso	17 a 30 de Junho	Coordenador de Curso
Registration in subjects	Matrícula em disciplinas	a partir de 15 Agosto	NG	1 a 15 de Julho	NG
Enrolment in subjects	Inscrição em disciplinas	1ª semana de Setembro	NMCI	16 a 31 de Julho	DA*
Enrolment in class timetables	Inscrição em horários	a partir de 16 Setembro	GOP	a partir de 15 Agosto	DA*

COMMUNITY PROJECT UNIT

✓ **Problem:** *"…little usefulness of website with insufficient information"*

✓ **Corrective measures:** change of structure of the area of projects; 1 person allocated to manage contents on the web; creation of a form for applications with pre-filled information

PEDAGOGICAL ORGANIZATION OFFICE (GOP)

✓ **Problem:** *"…frequently made mistakes when scheduling exams"*

✓ **Corrective measure:** the process became centralized at course coordinations (after making the evaluation chart for the coming academic years) while previously are centralized in different structures/people (GOP→ Course delegates→ Coordination → GOP) were involved before

HR DIVISION

✓ **Problem:** *"…perception of lack of autonomy of those who assist directly users"*

✓ **Corrective measure:** reinforcement of communciation through working meetings with units/areas of the HR Division

8.USEFUL LINKS

http://aep.tecnico.ulisboa.pt/en/sei/
http://bdigital.ufp.pt/handle/10284/1400
https://eprints.usq.edu.au/933/1/Fogarty_Catts_Forlin_Measuring_service_quality.pdf
https://eprints.usq.edu.au/933/1/Fogarty_Catts_Forlin_Measuring_service_quality.pdf
http://www.hraljournal.com/Page/10%20Mass%20Hareeza%20Ali.pdf
http://www.academia.edu/6188536/COMPARISON_OF_SERVQUAL_SERVPERF_BSQ_AND_BANKQUAL_SCALE_IN_BANKING_SECTOR
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http://www.icesal.org/2009%20PROCEEDINGS/docs/P5.pdf