

MANAGEMENT TRAINING COURSE CONFERENCE OUTLINE

NO. 4

THE ORGANIZING FUNCTION OF MANAGEMENT

OBJECTIVES

1. Intensify the knowledge of the principles of organization.
2. Introduce the five functions of management.
3. Develop a knowledge of the organizing function of management.
4. Develop some skill in making duty analyses and position descriptions and in setting up organization charts.
5. Consider carefully the assignment of the person to the job that has been set up.

AIDS AND MATERIALS

1. Worksheets 9—16
2. Chart Nos. 3—12

----- TIME SCHEDULE -----

10 min

I. Review

90 min

II. Organizing

- A. Analyzing the Objective and Mission
- B. Making a Duty Analysis and a Position Description
- C. Drawing up an Organization Chart
- D. Allocating the Personnel

10 min
110 min

III. Summary

- I. Review (10 min.)
Chart Nos. 6, 7,
8, 9, 10 and 11
- Quickly go over the four principles of organization by making use of Chart Nos. 6, 7, 8, 9, 10 and 11.
- Chart 5
- Then turn back to Chart No. 5 and explain how conscious management, or making sound decisions, is based on the above principles.
- Chart 4
- Turn back to Chart No. 4, and show that principles are iron-bound laws that we can neither ignore nor evade.
- Chart 3
- Turn back to Chart No. 3 and explain that we are still in the first of the four phases of the supervisor's job, i.e., the Management Phase.
- (10 min. to here)
- II. Organizing
(90 min.)
(10 min.)
- Turn to Chart No. 12, "The Functions of Management" and announce that the next big problem to be taken up in the management phase of this course covers the functions of management.
- Chart 12
- Explain that the reason we take up the organizing function before the planning function is that in this training course we are not concerned with the big, overall planning which would necessarily have to precede setting up an organization. Instead, the planning in the supervisor's work deals with operations, maintenance and various types of routine work. Hence organizing is taken up first.
- A. Analyzing the
Objective and
Mission
(5 min.)
- Ask the conferees what must be known first before any object, no matter how big or how small, can be built or before an organization can be set up.
- Undoubtedly someone will come up with the correct answer.
- (25 min. to here)
- The answer, of course, is --The mission, or aim, or objectives must be known. And a clear statement of the mission can be made only by analyzing it thoroughly.

- B. Making a Duty Analysis and a Position Description (25 min.)
- Ask the conferees whether any of them has ever made a duty analysis of his own job. When? Where? Did it serve a useful purpose?
- Worksheet 9
- In order to save time explaining what a duty analysis looks like distribute Worksheet 9, "An Analysis of an Administrative Section Chief's Job."
- Have the conferees spend a few minutes reading over this worksheet.
- Worksheet 8
- Chart 11
- Ask the group which principles of organization have a direct bearing on the making of a duty analysis. Turn to Chart No. 11, and at the same time refer the conferees to their own copies of Worksheet 8.
- Worksheet 10
- Next, have the conferees turn to Worksheet 10, "Making an Individual Duty Analysis," and have them study it carefully.
- Worksheets 11, 12 and 13
- Then distribute Worksheets 11, 12 and 13, which are sample position descriptions. Have the conferees note that the duty analysis is included in the position description but that the latter gives a clearer picture of the nature and scope of a particular position.
- Assignment:
A Position Description
(50 min. to here)
- Next announce that as an outside assignment each conferee is to submit a position description for his own position before the opening of Conference 5.
- C. Drawing up an Organization Chart (40 min.)
- Some of the Conferees are already familiar with organization charts, but this will be an entirely new subject to some.
- Chart No. 3
- Turn to Chart No. 3, and point to the organization chart located under Management Phase.
- Ask the conferees what this simple chart reveals to them about the particular organization shown.

Point out how this organization functions in accordance with the principles of organization.

Explain further points about this simple chart that may not have been brought out in the discussion so far.

Worksheet 14

Distribute Worksheet 14, "A Sample Departmental Organization Chart."

Quickly add necessary explanations of this chart.

Worksheet 15

Next turn to Worksheet 15, "Mechanics of Chart Construction."

Have the conferees read this worksheet carefully. Then discuss it, paragraph by paragraph.

Worksheet 16

Next distribute Worksheet 16, "Organization Charts: Before and After."

Ask the conferees what they detect is wrong with the "Before" chart.

Then have the group turn to the back of this worksheet and have them read the explanation. Discuss these points until they are fairly clear to everyone. Encourage the conferees to study these worksheets carefully outside of the conference time.

D. Allocating the Personnel (10 min.)

Ask the conferees what is the first thing necessary before personnel can be assigned in an organization.

If no one has a ready answer, refer the group to the points brought out earlier in today's conference. Someone will hit upon duty analysis, or position description.

Ask the group what is the next big problem. Someone is bound to come out with the correct answer, which is to get the right person in the right job.

(100 min. to here) Explain that this is too big a problem to take up today but that it will be taken up in parts of conferences in all four phases of this training course.

III. Summary (10 min.) Make a summary of today's conference by taking up each of the main points briefly.

Be sure that the assignment is clear to each conferee. Ask conferees who have trouble understanding the assignments to see you after the class is over.

AN ANALYSIS OF AN ADMINISTRATIVE SECTION CHIEF'S JOB

MAJOR RESPONSIBILITIES:

1. Supervises accomplishment of routine division office duties.
 - a. Checks correspondence, in and out.
 - b. Answers telephone and places calls.
 - c. Work orders and printing requests.
 - d. Routing of communications and assignments.
 - e. Collection, assembly, and forwarding reports.
 - f. Maintains separate current files and books.
 - g. Accomplishment of typing jobs originating with various staff members.
2. Supervises accomplishment of work originating with the Division Chief.
 - a. Correspondence.
 - b. Reports.
 - c. Material for conferences and classes.
 - d. Changes in policies and procedures.
 - e. Requisitions, transfers, reclassifications of personnel.
 - f. Arranges for staff and special meetings.
3. Supervises maintenance of files.
 - a. Correspondence files.
 - b. Record files and comprehensive reports.
 - c. Bulletins—Regulations—Orders.
 - d. Forms.
4. Supervises duplicating functions.
 - a. Assignment of printing jobs.
 - b. General planning in reproduction of manuals and bulletins, notices.
5. Special and other assignments.

RESPONSIBLE TO: Division Head

DIRECTS THE WORK OF: 2 senior clerks, 3 junior clerks and 2 messengers.

MAKING AN INDIVIDUAL DUTY ANALYSIS**STEPS IN THE PROCEDURE:**

1. Make an exhaustive list of the things done every day by the individual and add to the things he does any new ones you want him to do.
2. Apply the numbering system to the list and develop major responsibilities and details under those major responsibilities, being sure to eliminate those obviously out of place.
3. Analyze each major responsibility to see if it conforms to the knowledges and skills required in major duty. No. 1 helps the person to do No. 2 and both 1 and 2 help with No. 3 and so on.
4. Analyze all of the major responsibilities in terms of a day's work; neither too much nor too little. Both are bad for morale.
5. Include as a last duty—special assignments.
6. Add a statement which makes the person responsible to one boss or supervisor.
7. Add a statement which shows for whom the person is responsible.

ADDITIONAL CHECKS:

1. Five to seven duties for a routine worker. Seven to ten duties for a staff member.
2. Making a Unit analysis or one for a Branch or Section. The process is the same except every essential job in the unit or branch must be placed somewhere. Someone must be responsible.

Here is the principle of homogeneous grouping—in a very simple form:

1 Shoes	3 Bolts
2 Wrench	3 Nuts
1 Baseball bat	3 Cotter pins
1 Shirt	2 Screw drivers
1 Gloves	1 Coveralls
2 Lunch boxes	2 Hammers

I Clothing	II Tools
a Shoes	a Wrench
b Shirt	b Screw drivers
c Coveralls	c Hammers
d Gloves	

III Supplies
 a Nuts
 b Cotter pins
 c Bolts

Baseball bat and lunch boxes do not fit in.

A SAMPLE POSITION DESCRIPTION

POSITION: Telephone Operator

1. Nature and Purpose of Work

Introduction:

Operates one position on a multiple or non-multiple switchboard, handling local, long distance, and/or information calls.

Duties:

Completes local and long distance calls and relays calls as required.

Gives information regarding telephone numbers and circuit connections as required.

Maintains records of calls as required.

2. Scope and Effect of Work:

Speed and accuracy of operation affects the emergency mission, as most calls handled are of official nature and are of utmost importance.

3. Supervision and Guidance Received:

Works under supervision of Chief Operator; refers unusual problems to supervisor, such as special routing and questions regarding numbers to be used to contact high officials in emergencies. Uses telephone book and special instructions as guides.

4. Mental Demands:

Must memorize circuit connections and special telephone numbers, often of confidential nature.

5. Personal Work Contacts:

Telephone contacts are with military and civilian personnel of all levels, including high ranking officials and requires use of tact and courtesy at all times.

6. Other:

A pleasing voice over the telephone is desirable.

A SAMPLE POSITION DESCRIPTION

Fire Fighter

1. Nature and Purpose of Work

A. Position is located in the fire department which provides fire protection and fire prevention services. As a crew member, fight fires. Inspects base facilities.

B. Duties

As a member of a fire fighting crew, fights fires. Alternates with other crew members as hoseman, nozzleman, hydrantman and rescueman. Receives instructions from fire captain specifying such things as hydrants for hose connections, locating of hoses, place of entry into buildings. Performs duties in accordance with accepted fire fighting techniques and manuals.

Following manuals and base regulations, inspects base facilities for fire hazards. Looks for such hazards as frayed wiring, inoperative switches, malfunctioning sprinkler systems, exhausted or damaged fire extinguisher, blocked exits. Recommends corrective action to operating officers. Prepares written report of discrepancies noted for supervisor.

Attends social functions to assure adherence to fire prevention regulations and practices. Watches for such hazards as careless handling of a cigarettes and crowded or blocked exits. Sounds alarm and controls crowd in case of fire.

Receives continual training in fire fighting. Through fire drills practices fighting fires. Follows verbal instructions and manuals in increasing fire fighting skills and learning new techniques.

Performs desk watch. Performs housekeeping duties.

2. Scope and Effect

Reduces probability of fires by assisting operating officials in eliminating fire hazards. Failure to use proper techniques in performance of fire fighting duties could result in loss of life and/or property.

(cont'd)

3. Supervision and Guidance Received

Receives verbal instructions specifying assignments and follows accepted practices and procedures prescribed in manuals and drills in fighting fires. Follows base regulations, accepted fire prevention practices in inspection and stand-by work.

4. Mental Demands

Requires mental alertness to detect fire hazards during usual inspections and stand-by work. Must know accepted fire fighting practices, methods, well enough to use them quickly and skillfully at fires. Must be able to think and act quickly on own initiative in emergencies at fires.

5. Personal Work Contacts

Contacts operating officials to obtain cooperation in eliminating fire hazards.

6. Other

Works on a 24 hour on, 24 hour off shift. Must be on the alert during duty hours.

A SAMPLE POSITION DESCRIPTION

POSITION: Aircraft Welder

DUTIES AND RESPONSIBILITIES:

1. Under general supervision. May instruct Juniors and Helpers.
2. Performs all electric and/or acetylene welding on difficult surfaces and tubular aircraft constructions, involving any metals (including stainless steel, monel metal, aluminm, and other metals).
3. Does fillet, up-right, overhead, lap, single and double butt, single and double V, and cluster welding.
4. Does layout planning and set up of welding jigs from blue-prints.
5. Takes measurements and makes sketches for experimental parts.
6. Performs any task of Jr. Aircraft Welder.
7. Cuts plates and castings, performs other tasks as required.

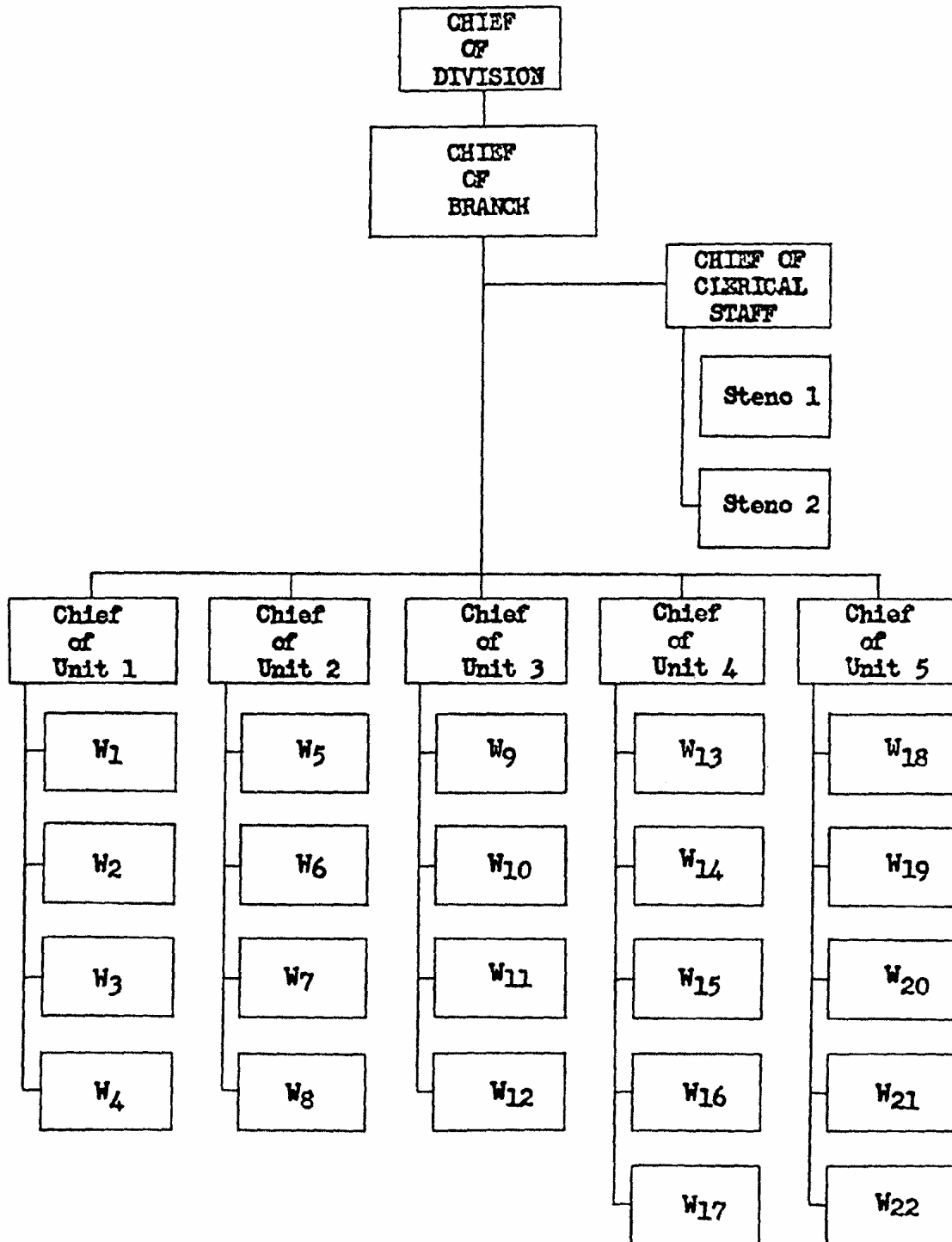
PHYSICAL EFFORT:

Active; strained positions.

WORKING CONDITIONS:

Danger from burns; eyestrain; wears hood.

A SAMPLE DEPARTMENTAL ORGANIZATION CHART



Conference 4, Worksheet 14

MECHANICS OF CHART CONSTRUCTION

It is impossible to find established standard ways of constructing organization charts. Even the nomenclature is varied. It has been considered advisable to set down a few basic controls on organization chart development.

These are considered as practical.

ON CHART MAKING

1. Show on any individual chart—one level above and two levels below.

2. Make the rectangle representing the person or unit around which the chart centers the largest one on the chart, with the size of the rectangles on each lower level becoming one size smaller than the key figure.

3. On the first level below, keep the coordinate jobs on the same horizontal level and the same size.

4. On the second level below, the coordinate jobs should be all the same size, but usually must be in vertical, rather than horizontal position. Command lines do not run thru each position, but usually from end of each rectangle directly to the line leading to the higher level.

5. Staff and service functions can be placed above the line functions, usually to the right. They should be the same size rectangles as other coordinate positions on the organization chart.

6. Service functions usually lead in from under the level served. Advisory and counselling functions can be placed on the same level and lead directly into the level they serve. (Don't worry about this.)

7. Line functions are shown by strong, firm, solid lines. Dotted lines show technical supervision, service and coordinating relations. The latter types are usually not drawn in. Technical supervision must have the author-

ity of a written directive or regulation behind it.

8. Making the lines to the right and bottom of each rectangle double weight adds to the attractiveness of the chart.

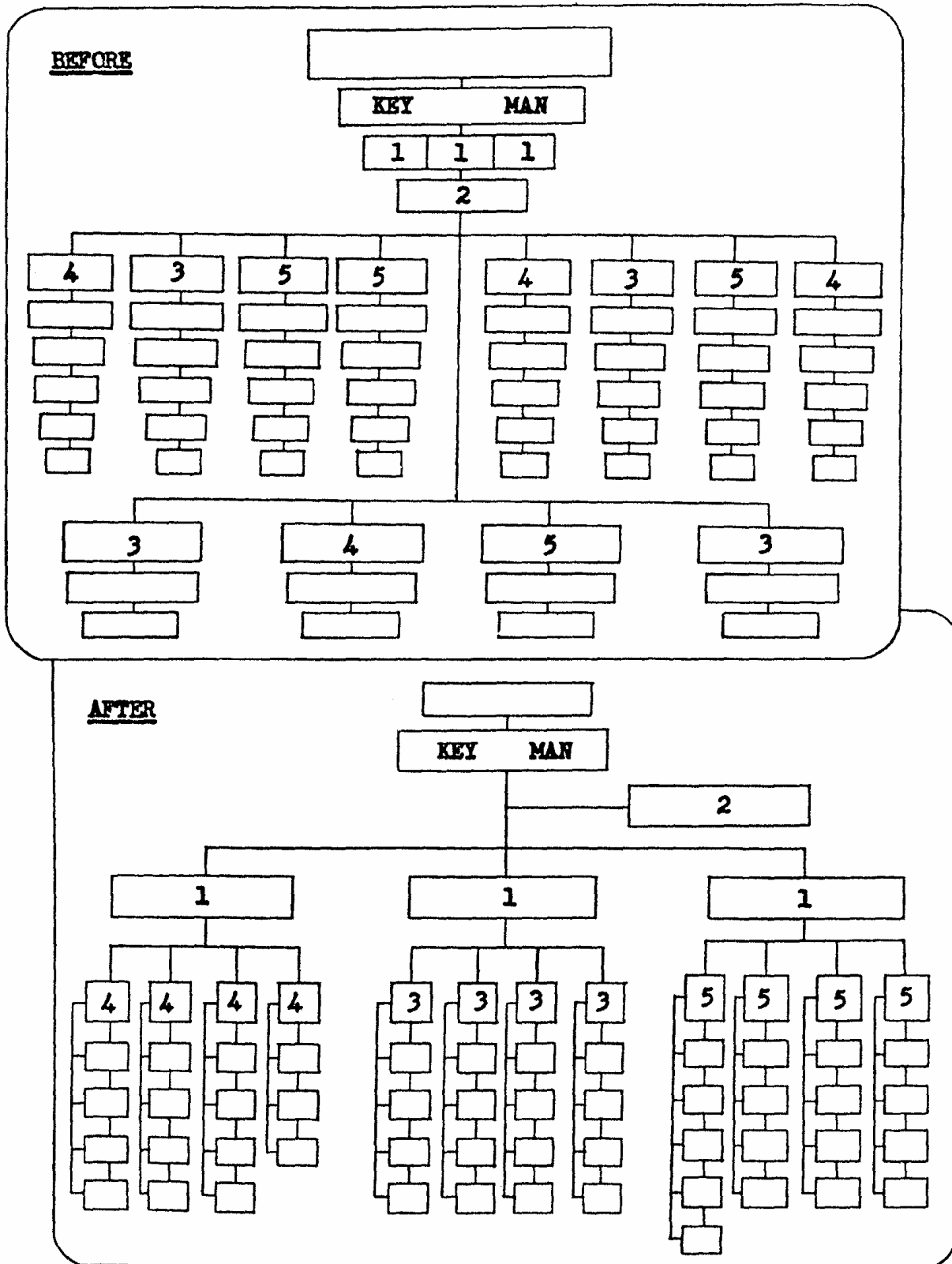
9. Types of Charts:

a. Division or Department Chart. May include Office, Division, Branch; or Division, Branch, Unit; or Branch, Unit, Sub-Unit. This is the most concise and practical chart. Often the names of the persons may be included in the rectangle indicating the position.

b. Position or Title Chart: Instead of using name of Division, Branch or Department, title of person is given. Often the name is given.

c. Functional Charts: These charts show major responsibilities of departments or persons. This requires large rectangles.

NOTE: By "line" is meant channels of regular functions assigned to an operational unit; by "staff" is meant functions aiding in the execution of regular functions. The latter is essential in making operations efficient. "Staff" functions can, therefore, include clerical and stenographic functions, as well as upper-level operations and planning.



(Cont'd)

Conference 4, Worksheet 16

EXPLANATION OF "ORGANIZATION CHARTS—BEFORE AND AFTER"

A supervisor was ordered to develop an organization chart of his department. He had seen charts before but had no knowledge of the principles of organization behind the layout of a chart.

Note some of the errors he made:

He had his 3 assistants helping him in all of his work. This caused overlapping and duplication and some of the jobs neglected.

His chief clerk (2) was made directly responsible over 12 other subordinates which is far too many.

He made his chart so that all these subordinates had to come to him through his chief clerk (2) to his 3 supervisors and then to him.

He had each worker down the line come through each other worker.

After the supervisor had had the training on management he did a few interesting things.

He put his chief clerk (2) off to the side and responsible directly to him.

He limited those reporting directly to him to 4, which is a good average load.

He grouped his departments (4s), (5s), (3s) together and put one of his assistants over each grouping.

He made it so that each subordinate had a direct line to his immediate supervisor.

He saw to it that every subordinate had only one boss. He complied with the principle of unity of command.

Conference 4, Worksheet 16 (cont'd)

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