

STAFFING MANAGEMENT
STUDENT WORKBOOK

SHRMTM

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

Four Recruitment and
Retention Case Scenarios

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Introduction

These recruitment and retention case scenarios are designed to be presented sequentially, since each scenario builds upon the previous one. They are intended for undergraduate college students.

LEARNING OBJECTIVES

You will learn to:

- Determine recruitment needs.
- Identify recruitment policies and guidelines.
- Determine a recruitment strategy.
- Develop a communication plan to implement the recruitment strategy.

GENERAL DIRECTIONS FOR SCENARIOS

You are presented with a business-based scenario. Review the scenario and consider the requirements for staffing the new project. Additional information is provided for each scenario to help you make your decisions. You have 35 minutes to read about the organization and review information gathered from the suggested readings. Allow 25 minutes to answer the four questions presented with the scenario.

There are four scenarios. You should read each scenario before class. The lists of suggested readings are independent study materials and are intended to provide you with additional related information.

SCENARIO SCHEDULE

The scenarios are designed to take 1 hour each to complete:
5 minutes to review the organization and to discuss it in the group.
30 minutes to read the scenario and suggested readings and to discuss “Things to Think About”.
25 minutes to answer the questions provided for each scenario.

GENERAL NOTES BY SCENARIO

Scenario 1: Increasing Staff to Complete the First Phase of a Project

Information will be provided about MRG HPI. Note the organizational structure and the types of positions this organization hires and must retain. Discuss recruitment strategies MRG HPI might use for various positions (advertising, job banks, recommendations, job fairs, etc.). Discuss internal versus external recruitment. Note the existing recruitment guidelines included in the additional information for Scenario 1. Discuss the existing organizational policies to obtain approval for new hires.

Scenario 2: The Effect of Firing the Program Manager on Staffing for the Second Phase of the Project

Discuss retention and recruitment issues as they pertain to replacing a leader. Look at all options within and outside the organization. List potential recruitment challenges.

Scenario 3: The Effect of Losing Staff Members during a Staff Reduction

Discuss the emotional and motivational effect on staff when a staff reduction occurs. Consider the challenges in recruiting for positions that were lost due to a reduction in staff. Share ideas on how to initiate long-term retention strategies in light of staff reductions.

Scenario 4: The Effect of Additional Workload on Continuing Operations

Discuss the challenges facing employers who must hire quickly. Note that existing policies may affect the process, the approval mechanisms and budgets. Discuss retention issues for existing staff with additional workloads. Consider scheduling the staff acquisition in stages; the first stage to meet pressing needs and the next stages to meet long-term needs.

SUGGESTED READINGS

Below is a list of suggested readings that may provide real-world insight from organizations faced with similar situations. These readings are intended to be self-study.

Scenario 1

1. Recruitment Strategy for the Goddard Space Flight Center.
<http://ohcm.gsfc.nasa.gov/wfstatistics/home.htm>
2. VETS Report on Affirmative Action Employment Program for Women and Minorities. *<http://www.dol.gov/vets/affirmative/action.pdf>*
3. Recruitment Incentive. *<http://www.opm.gov/oca/pay/html/recbonfs.asp>*
4. Recruiting Stars: Top Ten Ideas for Recruiting Great Candidates.
<http://humanresources.about.com/cs/recruiting/a/candidatepool.htm>
5. Examine Staffing: Operation Recruitment. *http://www.rt-image.com/Examine_Staffing_Operation_Recruitment_Strategic_planning_for_employee_retention/content=8104J05C4876808040B69A764468A0441*

Scenario 2

1. E.M. Bennatan. Catastrophe Disentanglement: Getting Software Projects Back on Track. *<http://safari.oreilly.com/0321336623/ch09lev1sec3>*
2. What Makes a Good Project Manager.
<http://whitepapers.techrepublic.com.com/whitepaper.aspx?docid=158344>
3. Screw-Up 6: The Team Didn't Gel! The Project Manager Advisor.
http://leadingonedge.com/Articles/Project_Management_Screw-up-6.htm

Scenario 3

1. Retention of Employees: Tips and Tools for Employee Retention.
http://humanresources.about.com/od/retention/Retention_of_Employees_Tips_and_Tools_for_Employee_Retention.htm
2. Keep the People You Need in the Outsourced Economy.
http://humanresources.about.com/od/retention/a/lead_retention.htm
3. How To Retain Your Best Employees.
<http://humanresources.about.com/cs/retention/a/turnover.htm>
4. Got the Layoff Blues? Find Help and Hope.
<http://humanresources.about.com/b/a/116380.htm>
5. Downsizing with Dignity: You Can Downsize with Care—for People and the Business. *<http://humanresources.about.com/od/layoffsdownsizing>*
6. Jim Collins audiotapes (look in archived audio section...listen to 2 audios: 1) Getting people in the right seats over time and 2) Getting people off the bus.
<http://www.jimcollins.com/hall>

Scenario 4

1. Tips for Determining a Motivating Salary.
http://humanresources.about.com/cs/compensation/a/aasalaryrange_2.htm
2. Solve Technical Staffing Challenges.
<http://intbrill.com/weblogs/bunmi/archive/2007/04/01/7253.aspx>
3. Meeting the Competitive Challenge: A New Architecture for Lean Transformation. *<http://www.allbusiness.com/specialty-businesses/307777-1.html>*
4. Tune Design Creates “Tune Design Interiors” Division and Increases Staff.
http://www.tunedesign.com/recognition/2003_05_increase_staff.htm
5. Growing Pains. *<http://entrepreneurs.about.com/cs/beyondstartup/a/uc070903.htm>*



Organization Overview

- MRG Human Performance Improvement (MRG HPI) was founded in 1988 with the goal to improve human performance through the use of multiple technology avenues.
- To improve human performance, MRG HPI makes recommendations about how to change work environments to improve employee performance, motivation and morale; and develops courseware for skill improvement.
- The Training Solutions Division of MRG HPI develops the courseware products.
- Revenue for past year: \$25 million.
- Revenue for the Training Solutions Division for the past year: \$10 million.
- MRG HPI total workforce: 650 employees, 260 of whom are employed in the Training Solutions Division.

Case Study Background

- The Training Solutions Division (TSD) of MRG HPI was recently awarded a \$6 million contract to develop a training academy for ZULU, a United States government organization with highly educated personnel. The contract is for 36 months. The academy must be up and running in three months and the first classroom course offered at the start of the fourth month.
- TSD must develop the following before the first classroom course is offered:
 - a. A project plan and timeline for the academy's development, including web site design and launch, course development and repeat course cycles.
 - b. Paper-based training and educational products.
 - c. Web-based training and educational products.
 - d. Digitized video training and educational products.
 - e. Marketing brochures, posters and e-mail announcements.
 - f. Event logistics plans.
 - g. Delivery schedules for 15 courses.
 - h. Training analyses for the first and second courses.
 - i. Instructional design plans.
 - j. An instructor's guide, participant manual and PowerPoint presentation with a variety of multimedia components such as graphics, animations and videos for the first course.
 - k. An examination for the first course.

The training academy will be completely virtual. All academy marketing, courses and attendee registration will occur online. In addition, the academy web site will house course materials and records for attendee access, and an interactive forum for academy member collaboration.

The contract requires TSD to develop 15 classroom-based courses that are highly interactive and use innovative multimedia approaches. After all the courses are developed and delivered one time, they will be repeated during the last year of the three-year project.

Project Phases

Project development will occur in two phases:

Phase 1: Create the training academy (3 months).

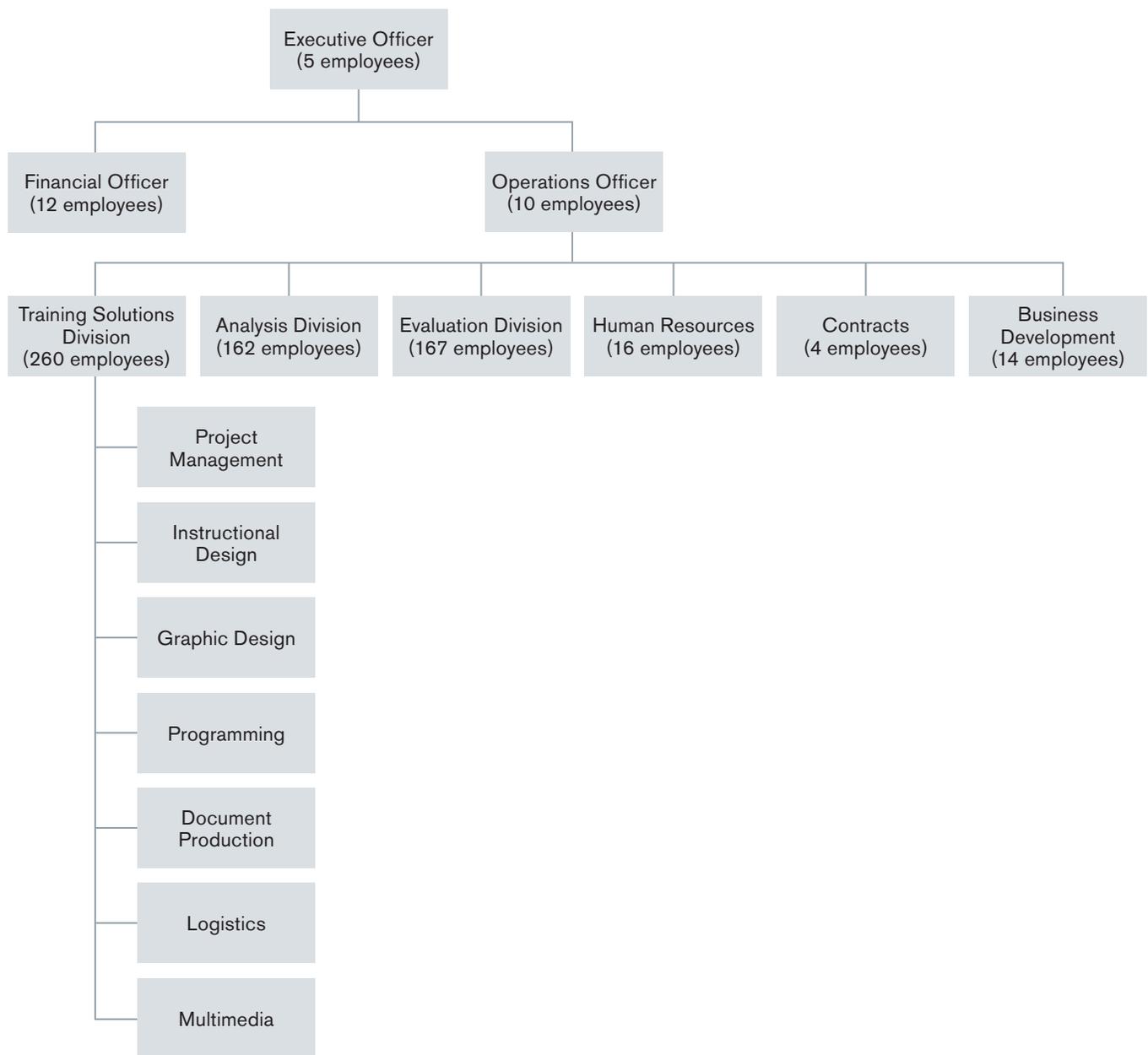
- Implement organizational structure.
- Develop and launch web site.
- Develop and implement branding for the academy.
- Develop and distribute marketing materials.
- Develop the first course.
- Deliver the first course.
- Begin development of the second course through the analysis phase.

Phase 2: Maintain academy operations, develop and implement remaining courses, and offer repeat sessions (2 years and 9 months).

- Complete development of the second course.
- Deliver the second course.
- Implement development schedule for the next 13 courses.
- Offer repeat courses during last year of the contract.
- Continue to manage the academy, maintain the web site and market the courses.

Organizational Structure

MRG HPT's current organizational structure:



The Training Solutions Division is a matrix organization* divided into the following branches:

- Project Management
- Instructional Design
- Graphic Design
- Programming
- Document Production
- Logistics
- Multimedia

* A matrix organization uses a multiple chain-of-command system. In a matrix organization, employees typically report to a manager with profit or overall project responsibility and to their functional manager who is responsible for maintaining product quality and functional performance.



Current TSD Staffing

All 260 employees in the Training Solutions Division are already assigned to projects. The new contract will require TSD to determine how many employees they will need for each division branch and for each project. They will need to take into account when current projects are ending; who can be moved from those projects to the new project; and how many new employees will be needed.

Scenario 1: Increasing Staff to Complete the First Phase



Read the Introduction of MRG HPI.

ADDITIONAL SCENARIO INFORMATION

MRG HPI Policies and Guidelines for Assigning Employees to Projects

MRG HPI is committed to maintaining a highly qualified talent pool. Therefore, all MRG HPI employees must be considered for new work opportunities before being terminated due to lack of an available, relevant assignment.

New employees must be hired to support existing workloads. Full-time position requests must include verification of the project assignment; a budget to support the position; and the duration of the assignment. If project will be short in duration, term hires must be considered or even the use of a consultant or subcontractor.

The addition of a new position requires written approval from the project manager, branch chief, the vice president of the Training Solutions Division, the chief operating officer, the chief financial officer and the vice president of Human Resources.

Subcontractor hiring requires written approval from the project manager, branch chief, of the vice president of the Training Solutions Division, the vice president of Contracts, the chief operating officer, the chief financial officer and the vice president of Human Resources.

Staff reassignments require written approval from the branch chief, the vice president of the Training Solutions Division, the chief operating officer, the chief financial officer, the vice president of Human Resources and the chief executive officer.

THINGS TO THINK ABOUT

Based on the scenario and the additional information presented above:

1. What are the existing recruitment policies and guidelines?
2. What challenges do they cause and what will you do to meet them?
3. What are your proposed results?

WHAT WOULD YOU DO?

1. What are some of the positions you may need to recruit? Why?
2. What are the existing recruitment policies and guidelines?
3. What is your recruitment strategy?
4. Develop a communication plan for hiring new recruits.

Scenario 2: The Effect of Firing the Program Manager on Staffing for the Second Phase of the Project



Read the Introduction of MRG HPI.

ADDITIONAL SCENARIO INFORMATION

Work is well underway. A *Task Management Educational Plan* is being written to articulate the scope, work breakdown, processes, schedules and assignments at each project phase. This plan must be done within the first month of the project start date. MRG HPI hired a new program manager from outside the organization to oversee the new project. MRG HPI hired her based on her college degree and years of experience in the field, and needs her to get up to speed quickly. An existing program manager who worked on the project proposal and who has met the client is assigned the project's principal instructional designer.

CLIENT'S REQUIREMENTS

The client expects the program manager to conduct weekly status meetings with them; communicate with them on a daily basis through e-mails and telephone calls; and to meet established deadlines for product delivery. The client will conduct quality assurance reviews immediately to keep the schedule on time.

SCHEDULE AND WORKLOAD REQUIREMENTS

The team is organized into three divisions: course development, marketing, and web site development. Each division has a lead team member. The program manager has oversight of the entire project.

- The web site must be designed and launched two months after the project start date.
- A marketing plan and branding campaign must be designed before the web site can launch.
- Marketing products must be ready for distribution at the same time as the web site launch.

- The first course must be delivered at the start of the fourth month from the project start date.
- The course review and rehearsal must be ready two months after the project start date.
- Analysis work for the second course must start two months after the project start date.

PROGRAM MANAGER'S ACTIONS

The program manager seems friendly but does not seem to be leading the team. She holds weekly status meetings with the client, but doesn't say anything during those meetings. She responds only by e-mail to client communications, and calls only to confirm meetings.

The client is not impressed with the program manager's performance and notices that the lead instructional designer is actually filling both the program manager and instructional designer roles. One month into the project, the client mentions the program manager's performance to the vice president of the division. The vice president promises to talk to the program manager and help her improve her performance.

By the end of the second month, the analysis for the second course has started. The first course is ready for review and rehearsal, which means all materials have been developed and are ready for instructor review. The preliminary branding campaign was completed, marketing materials are ready for approval, and the first version of the web site has launched.

The vice president of the division phones the client and asks for feedback on the project accomplishments to date and the program manager's performance.

The client praises the progress made in such a short time, but thinks it has happened in spite of the program manager. The client informs the vice president that the program manager missed the deadline for delivery of the *Task Management Educational Plan*. When it was finally delivered, the client sent it back as unsatisfactory. Also, the client feels that the program manager has been uncommunicative; she has not said a dozen words in the past eight weekly progress meetings. The client is not pleased with the program manager's performance. At the end of the third month, MRG HPI decides to replace the program manager.

In spite of this, team leaders have made sure that the first course is ready, the web site is launched and the marketing plan is developed and implemented on schedule.

A new program manager is needed right away. What would you do?

THINGS TO THINK ABOUT

1. What options exist to find a new program manager?
2. What recruitment issues do you have?
3. What retention issues might you have?
4. List the recruitment and retention challenges you face in filling the position quickly.
5. Who must you communicate with to implement your strategy?
6. How will you ensure that the new hire will be approved and hired as expediently as possible?

WHAT WOULD YOU DO?

1. What are the recruitment needs?
2. What are the existing recruitment policies and guidelines?
3. What is your recruitment strategy?
4. What is your communication plan for implementing the recruitment strategy?

Scenario 3: The Effect of Losing Staff Members during a Staff Reduction



Read the Introduction of MRG HPI.

ADDITIONAL SCENARIO INFORMATION

Six months into the project, the client reviews the progress and issues a stop-work order. The main issues identified during their review:

- There were different expectations about the complexity of graphics in course development and course materials.
- There were different opinions about the level of marketing required (marketing a course versus the entire academy, no post-course promos, etc.).
- There were issues with instructors. There were instances where instructors had rescheduled on multiple occasions or cancelled.
- There were concerns about the subject matter experts (SMEs). SMEs had been hired outside of the budgeted amount. There were also concerns about the SMEs not providing the level of technical writing expertise required, which resulted in having to hire additional technical writers.

MRG HPI addressed some of these concerns by removing the videotaping requirement during the analysis phase and removing the repeat courses that were going to be offered during the final contract year.

By eliminating videotaping and repeat courses, the remaining courses to be developed and presented were stretched over the rest of the contract (2 ½ years).

This means that instead of developing and offering the 15 courses using two teams in a staggered fashion over two years, MRG HPI must reduce staff. Currently there are three senior instructional designers, six graphic artists, three document specialists, six technical writers, three subject matter experts, and two editors assigned to the teams. Your subject matter experts are consultants under contract. You don't want to lose your staff, but you may have no choice but to let some go.

Some of the employees resign when they hear the news. Three instructional designers quit and the remaining three are searching for new jobs. All of your technical writers have résumés out to potential employers. Your senior graphics lead, a person you count on, has a job offer with another organization.

What will you do to maintain a staff to meet the contractual changes and ensure a quality product? What can you do to retain your employees and instill confidence that the program is stable?

THINGS TO THINK ABOUT

1. What challenges do the existing recruitment and retention policies and guidelines create?
2. What can be done to retain existing employees and replace the ones who have left?
3. What is your communication plan to implement your strategy?

WHAT WOULD YOU DO?

1. List your primary retention issues.
2. What can be done to retain existing employees and replace the ones who have left?
3. List plans you can communicate to your staff to alleviate any further issues with regard to retention and recruitment.
4. Create a communication plan to approve your strategy and disseminate the information.

Scenario 4: The Effect of Additional Workload on Continuing Operations



Read the Introduction of MRG HPI.

ADDITIONAL SCENARIO INFORMATION

The issues that caused the work-stop order were satisfactorily addressed and work on the project resumed. The client is impressed with MRG HPI's work products and with how they addressed some difficult issues during the development and delivery of the last six or seven courses. The client wants to add repeat courses back into the schedule and add four new courses. The client wants to start the new courses immediately and wants them completed within the next 12 months. The current work must continue and not be affected by the additional work.

CURRENT SCHEDULE AND WORKLOAD REQUIREMENTS

One course is scheduled to be completed this year. Three more courses are to be developed next year. It takes 6 months to develop each course. The three-year contract ends September 30 next year. All of the additional work must be completed by that date.

Current staffing consists of:

- One senior instructional designer
- Three graphic artists
- One director/videographer
- One subcontracted sound technician
- One media specialist
- One logistics coordinator
- One web programmer
- Two technical writers
- One subcontracted subject matter expert
- One editor
- One document specialist

CURRENT ORGANIZATIONAL STRUCTURE

The training academy is now two years old. MRG HPI has developed seven courses; the last one was the most challenging to develop and yet one of the most successful. The success rejuvenated the team, which was struggling after the termination of the program manager, the three-month work stoppage, a change to the workload and schedule requirements, and the loss of co-workers. Development and delivery schedules were tight and required a great deal of commitment and hard work. The teams' moods have run the gamut from devastation to euphoria. The current mood is somewhere in between.

RETENTION/RECRUITMENT ISSUES

In the previous scenario, some staff members were looking for employment elsewhere. Motivation issues still persist.

Additional staffing is needed because of the new work. A staffing analysis concluded that seven teams will be necessary to accomplish the additional work. Staff additions include:

- Three graphic artists
- Two logistics staff
- Three document specialists
- Two editors
- Fourteen technical writers
- Seven instructional designers (these will be negotiated with the subcontractor)

THINGS TO THINK ABOUT

1. What steps would you take to hire employees for seven new teams?
2. What will you do to integrate the new teams into the existing workforce without losing staff or product quality?
3. What methods could be used to recruit and staff quality teams?
4. What challenges will you face in obtaining the required approvals for new employees?

WHAT WOULD YOU DO?

1. List your retention and recruitment challenges.
2. Provide one example of a retention technique that can be implemented.
3. Provide three methods to recruit the additional staff quickly.
4. Write a communication plan for this situation.

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